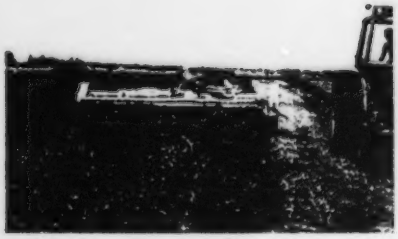
Manitoba Agriculture and Food

Program & Policy Analysis

1995

Manitoba Specialty & Forage Crops Industry Profiles



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N/A = not available

Data sources: *Agriculture and Agri-Food Canada*
Manitoba Agriculture and Food
Statistics Canada

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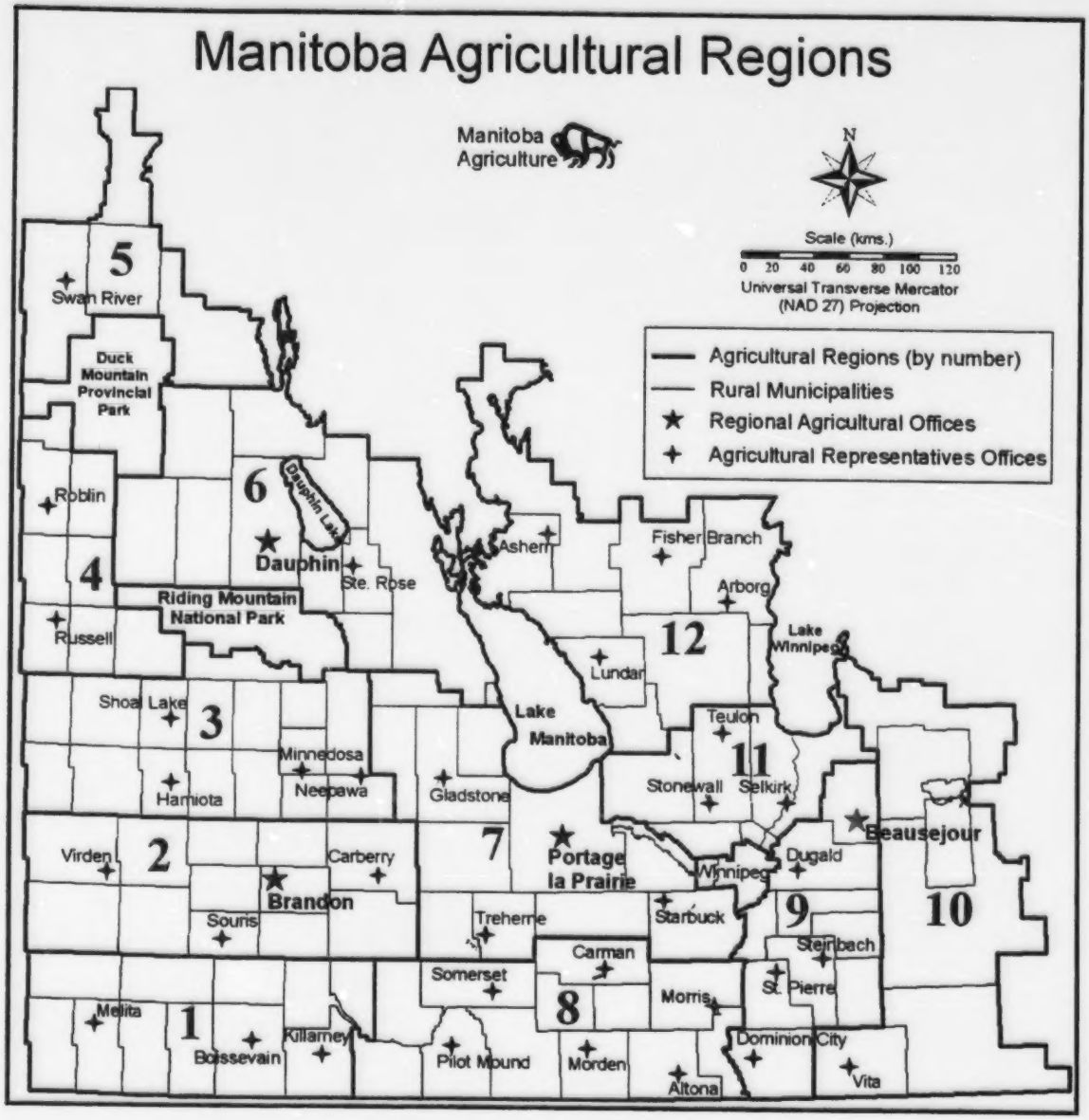
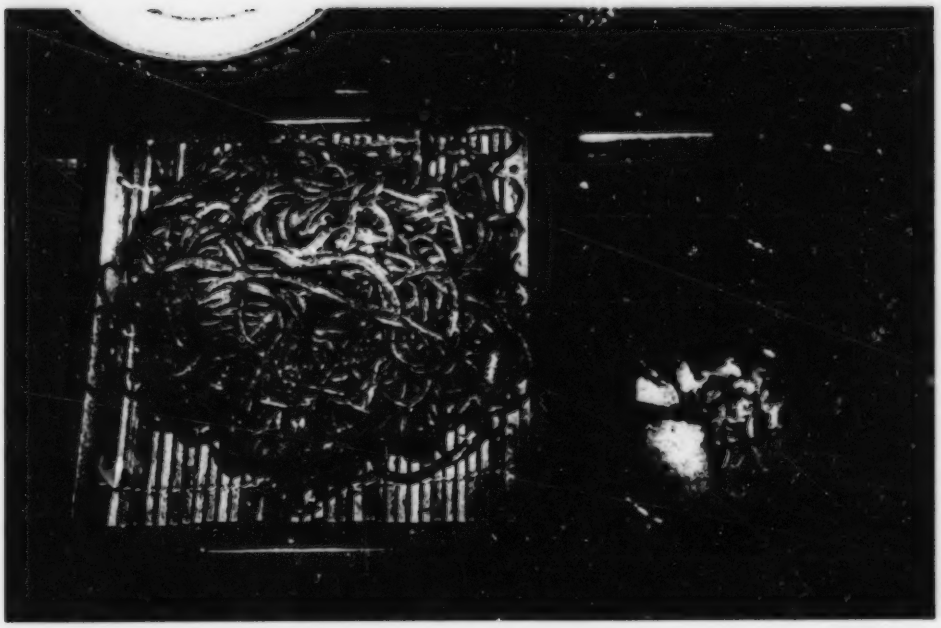
September, 2000



Administrative Region Name	Agricultural Region Numbers
Southwest	1, 2, 3
Northwest	4, 5, 6
Central	7, 8
Eastern/Interlake	9, 10, 11, 12

BUCKWHEAT SECTOR



BUCKWHEAT SECTOR PROFILE

Production:

No buckwheat production was recorded in Manitoba prior to 1925 when 9,400 acres produced 97,000 bushels of buckwheat. The seeded area fell to just over 2,000 acres in the late 1940s, but rose to 61,800 acres in 1956. The crop declined in popularity in the next decade, but by 1970, the seeded area had risen to 80,000 acres. The area planted to buckwheat peaked at 135,000 acres in 1979 following the record production of 2.7 million bushels in 1978. Plagued by adverse weather, buckwheat yields declined in the early 1990s and only 15,000 acres were harvested in 1993. Yields improved in 1995 and 1996 to 21.0 and 23.3 bushels per acre respectively, but declined to 16.0 bushels per acre in 1999, which was below the 10-year average of 17.3 bushels per acre. Harvested area, production and farm value of the crop in 1999 were 25,000 acres, 400,000 bushels and $2.6 million respectively, compared to 30,000 acres, 500,000 bushels and $4.0 million in 1998. Manitoba continues to be the "Buckwheat Capital of Canada" even though only 70 percent of the Canadian crop was produced in the province in 1999 compared to almost 90 percent in 1981. Other buckwheat-producing provinces are Ontario, Quebec and, in some years, Saskatchewan.

Average buckwheat prices have ranged between $3.40 and $8.40 per bushel since 1973. The average price of $6.55 per bushel for the 1999 crop was down by 17.2 percent from the average price of $7.91 per bushel the previous year.

Marketing:

Manitoba producers deliver buckwheat to cleaning plants, where foreign material is removed and the seed cleaned and graded to export standard. The seed is shipped by truck or rail for export. Small amounts are sold through Winnipeg companies to local consumers.

Processing:

Buckwheat is bagged and sold by XCAN Grain Pool Ltd. in Winnipeg or ground into whole or coarse buckwheat grits and bagged by W.H. Escott Co. Ltd. in Winnipeg. Vita Health Co. in Winnipeg markets consumer-sized bags of buckwheat flour and hulled buckwheat.

Trade:

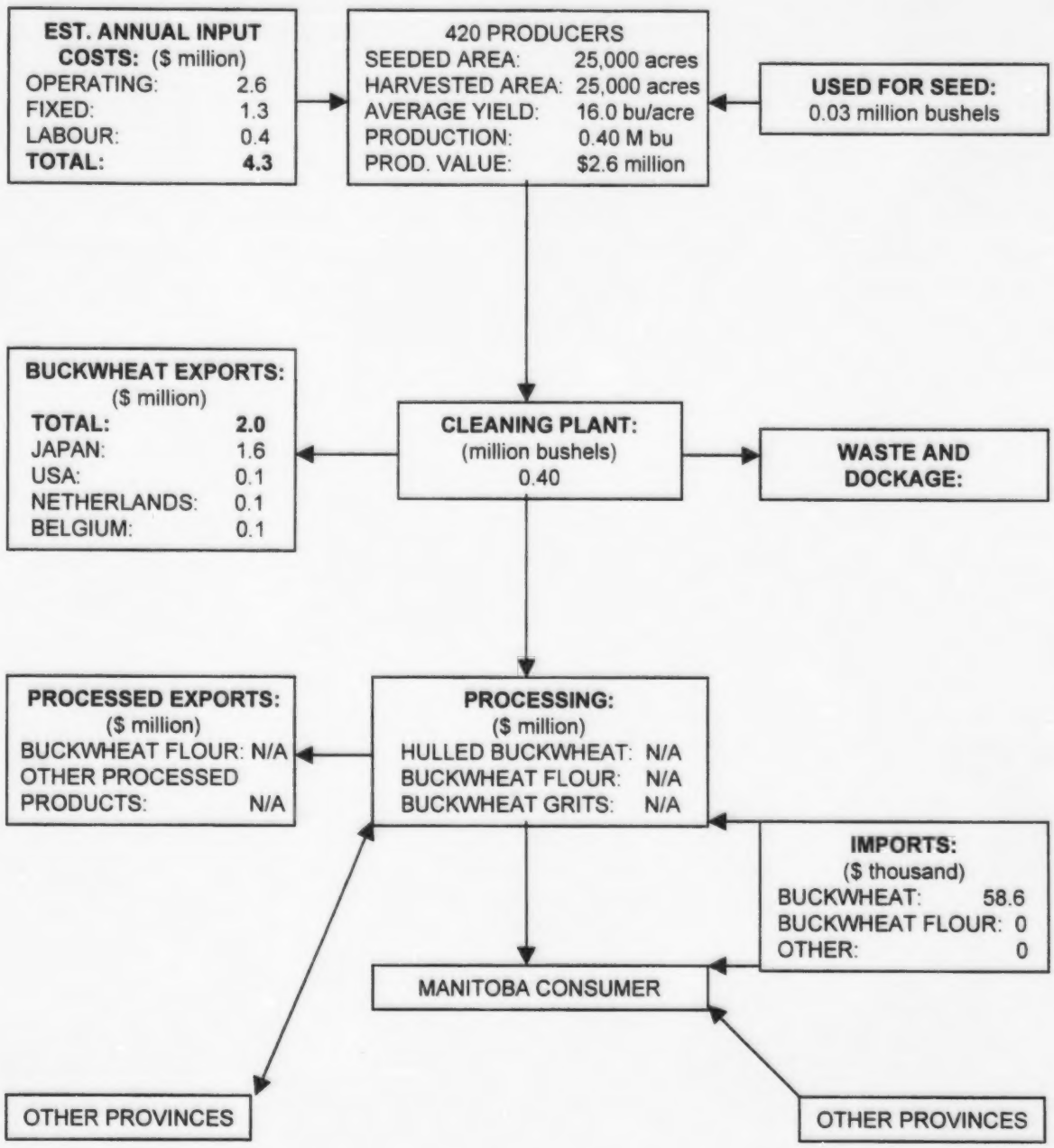
Most of Manitoba's buckwheat exports, valued at $2.0 million in 1999, were shipped to Japan, Netherlands, United States and Belgium. Although about half of Manitoba's exports in 1995 were purchased by Japan for processing into soba noodles, the Japanese share of buckwheat exports declined to 29 percent in 1996, but increased back to 60 and 80 percent of exports in 1998 and 1999 respectively.

Manitoba imported about $58,600 of buckwheat in 1999, all of which came from the United States and much of which was grown under contract to Manitoba firms.

BUCKWHEAT SECTOR

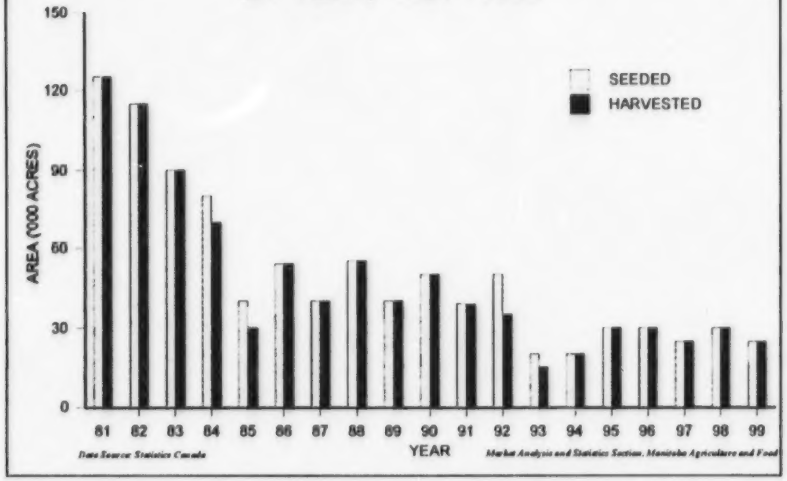
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	424	420	420	420	100
CROP PRODUCTION:					
Seeded Area ('000 acres):	30	25	30	25	83
% of Canada	68.0	63.8	82.2	72.5	
Harvested Area ('000 acres):	30	25	30	25	83
Yield/acre (bushels)	23.3	18.0	16.7	16.0	96
Production (thousand bu):	700	450	500	400	80
% of Canada	68.6	59.3	73.7	69.6	
Average Price ($/bu):	7.80	7.29	7.91	6.55	83
VALUE OF PRODUCTION ($ million):	5.4	3.3	4.0	2.6	65
ESTIMATED TOTAL EXPENSES ($/acre):	172.33	161.06	164.36	170.03	103
EXPORTS ($ million):	3.1	4.8	1.8	2.0	111
Unprocessed	3.1	4.8	1.8	2.0	111
Processed	0	0	0	0	
IMPORTS ($ thousand):	71.3	54.4	78.3	58.6	75
Unprocessed	71.3	54.4	78.3	58.6	75
Processed	0	0	0	0	

BUCKWHEAT INDUSTRY CHART, 1999

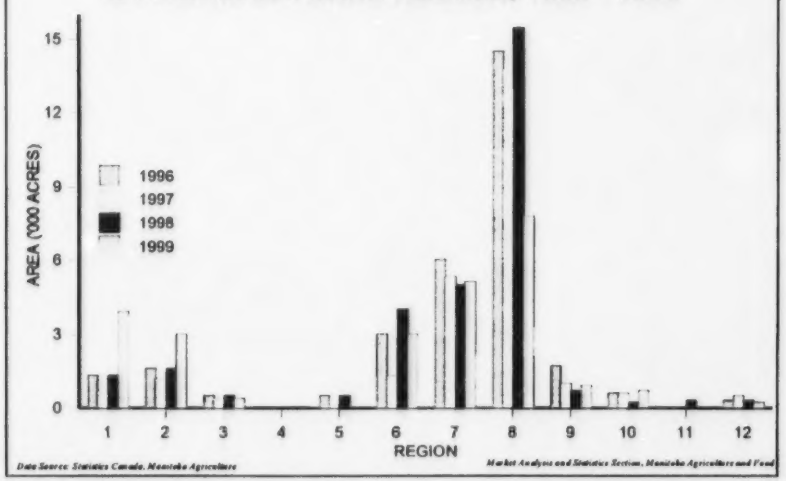


DATA SOURCE: Manitoba Agriculture & Food, Statistics Canada, Agriculture & Agri-Food Canada

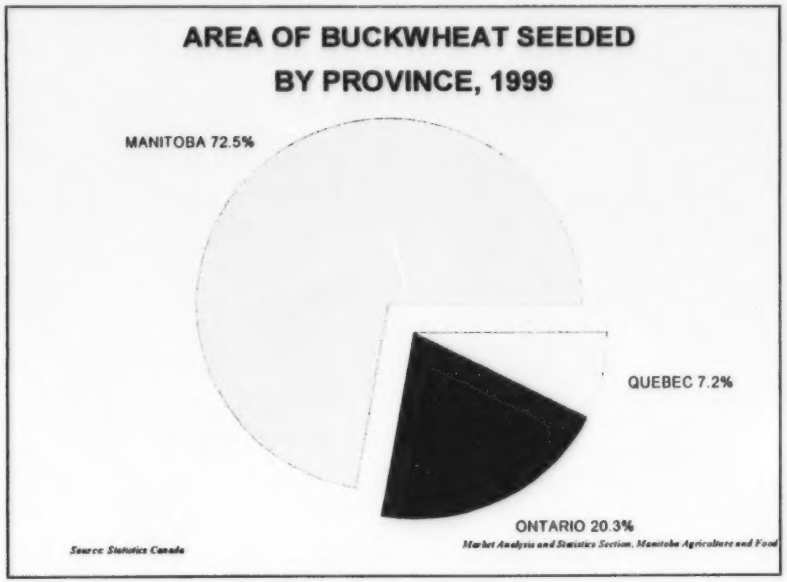
SEEDED & HARVESTED AREA OF BUCKWHEAT BY YEAR, 1981 - 1999



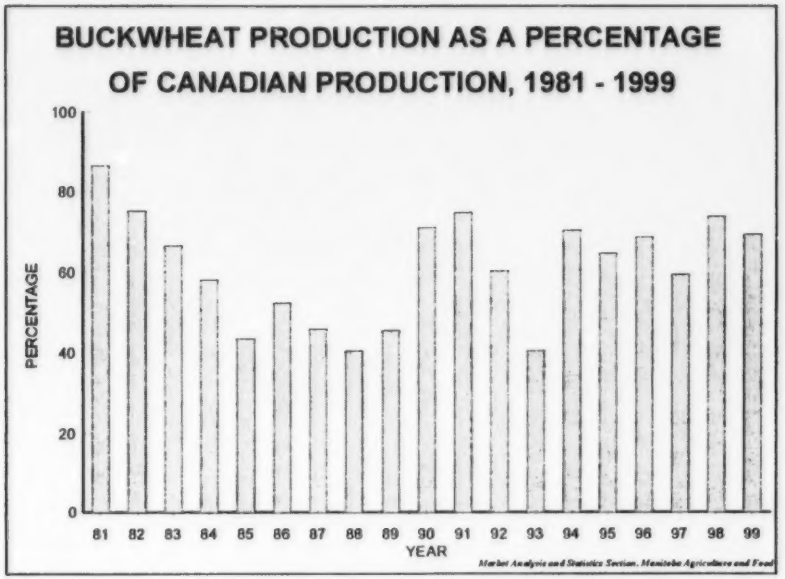
SEEDED AREA OF BUCKWHEAT BY AGRICULTURAL REGION, 1996 - 1999

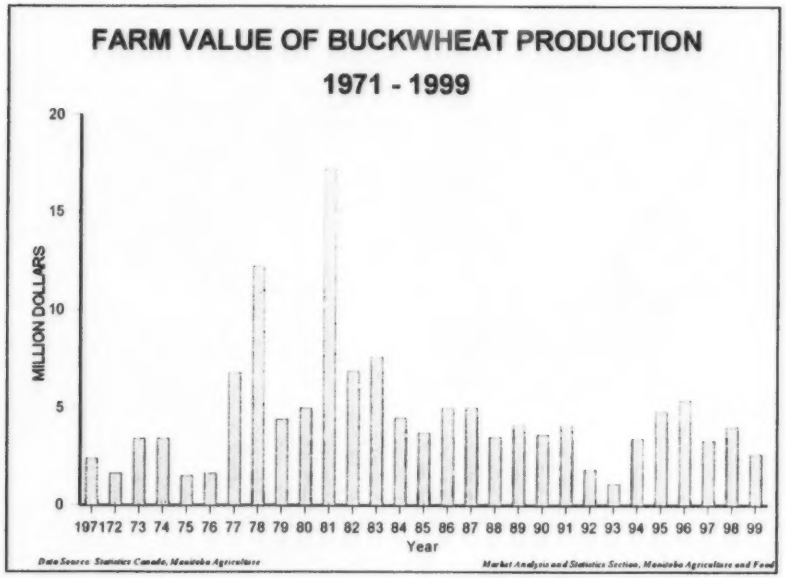


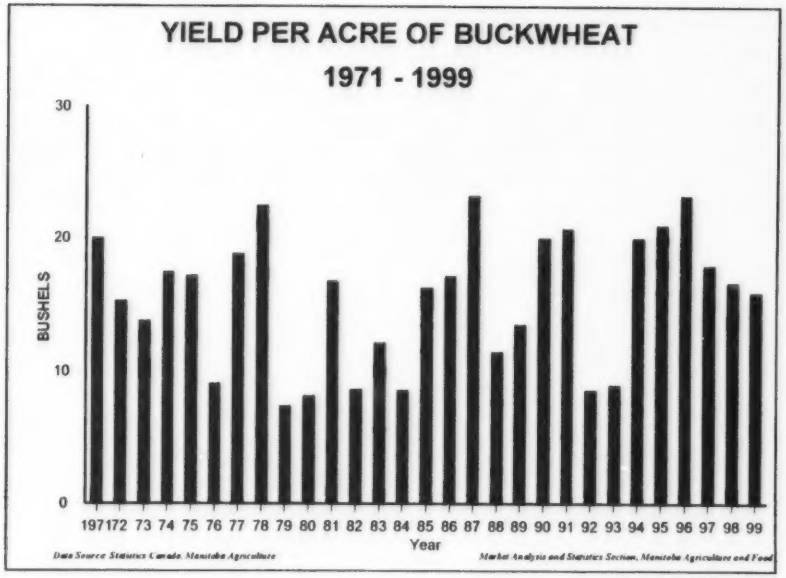
AREA OF BUCKWHEAT SEEDED BY PROVINCE, 1999

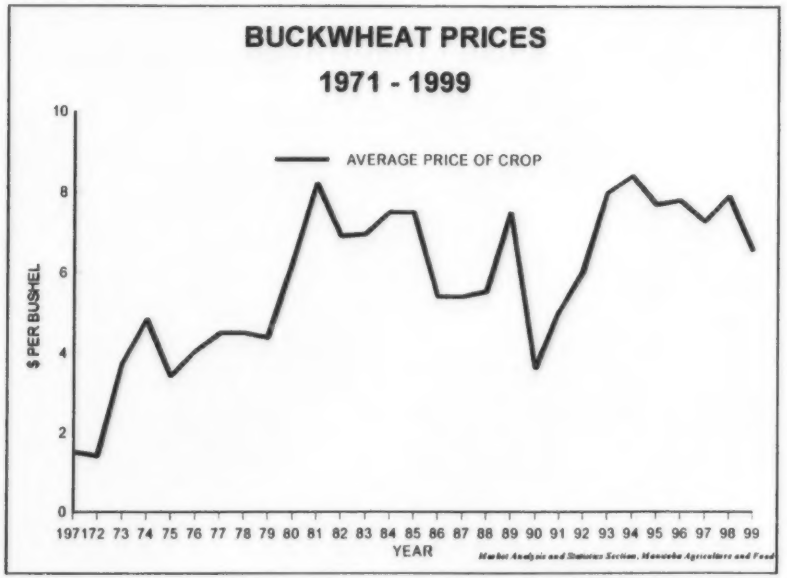


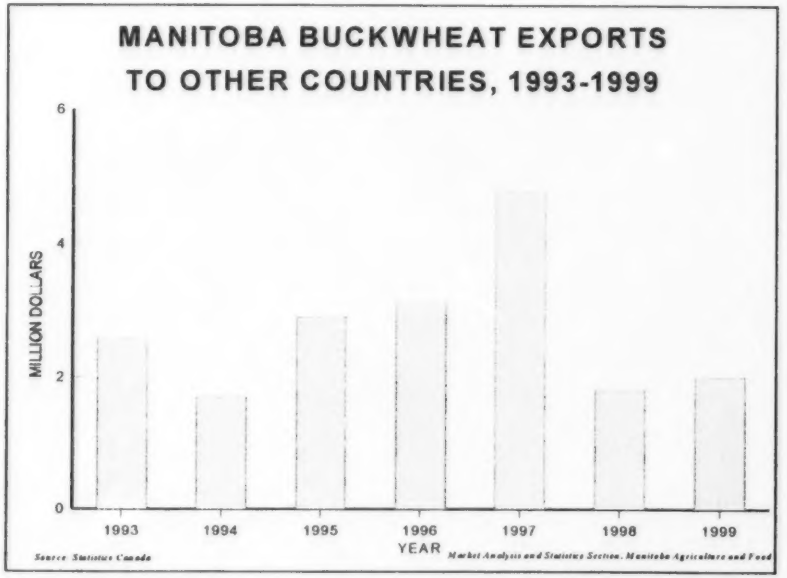
BUCKWHEAT PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981 - 1999

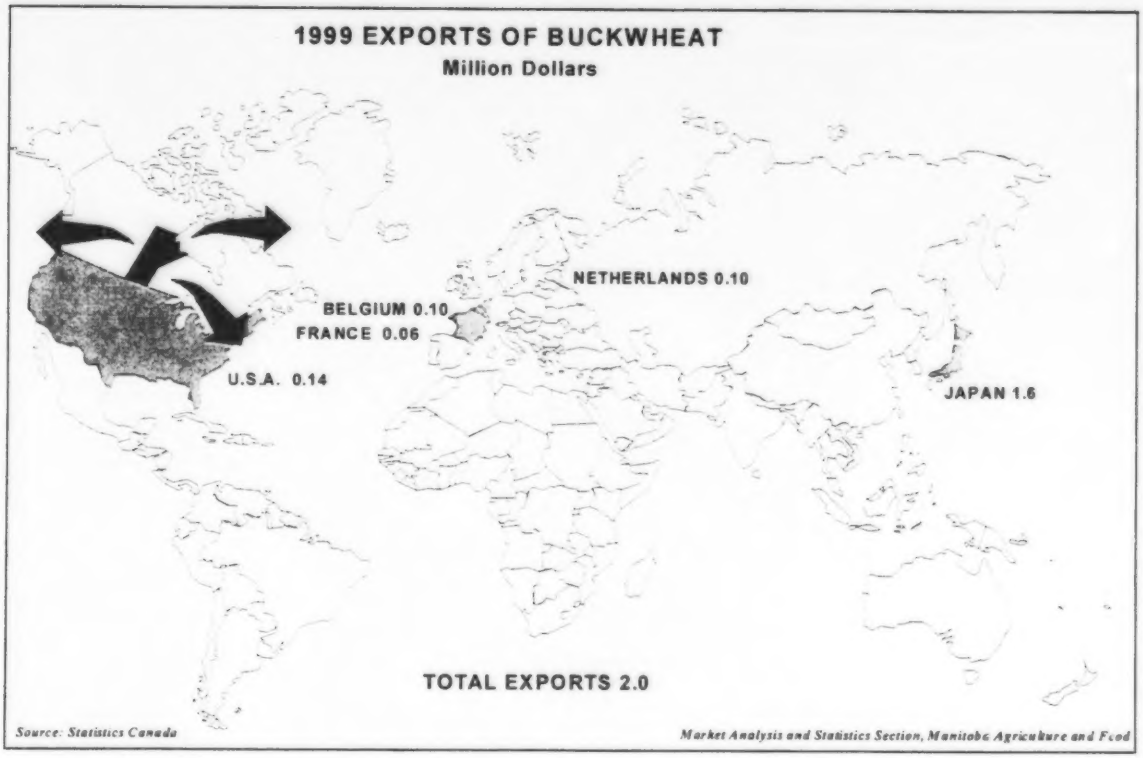


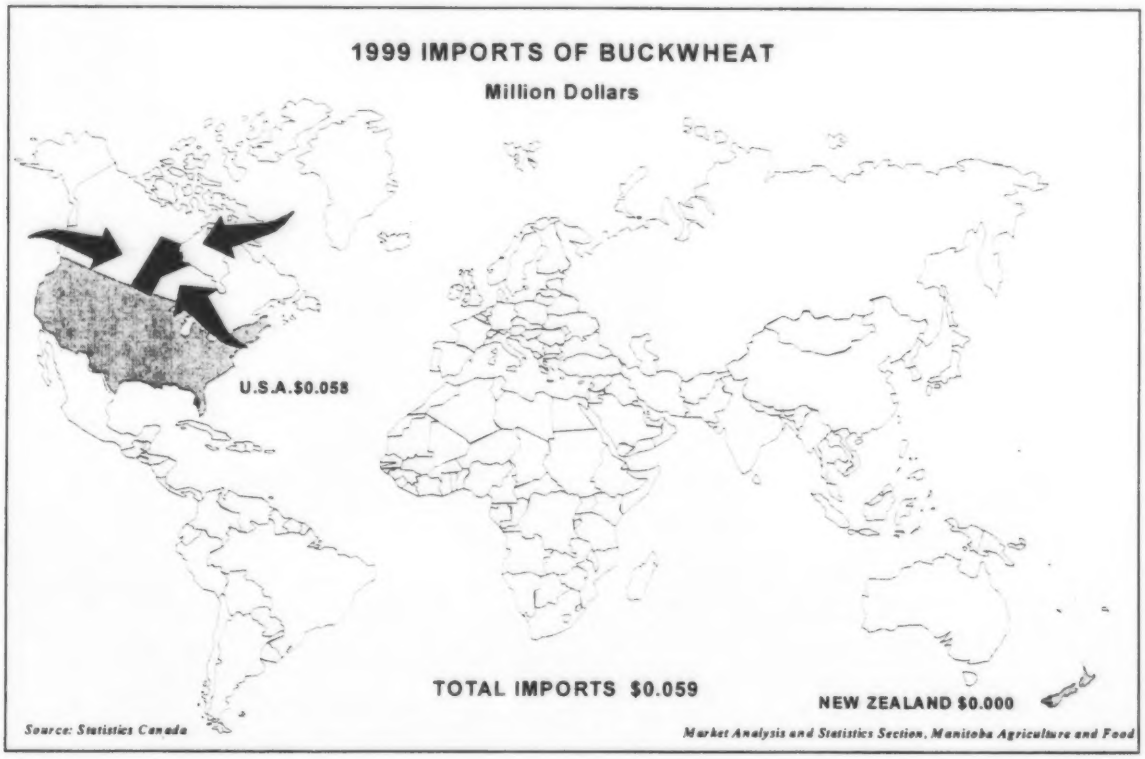

FARM VALUE OF BUCKWHEAT PRODUCTION
1971 - 1999
MILLION DOLLARS
20
15
10
5
0
1971 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
Year
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food


YIELD PER ACRE OF BUCKWHEAT
1971 - 1999
BUSHELS
30
20
10
0
1971 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
Year
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food


BUCKWHEAT PRICES
1971 - 1999
AVERAGE PRICE OF CROP
$ PER BUSHEL
10
8
6
4
2
0
1971 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food


MANITOBA BUCKWHEAT EXPORTS
TO OTHER COUNTRIES, 1993-1999
MILLION DOLLARS
6
4
2
0
1993
1994
1995
1996
1997
1998
1999
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 EXPORTS OF BUCKWHEAT
Million Dollars
NETHERLANDS 0.10
BELGIUM 0.10
FRANCE 0.06
U.S.A. 0.14
JAPAN 1.6
TOTAL EXPORTS 2.0
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF BUCKWHEAT
Million Dollars
U.S.A.$0.058
TOTAL IMPORTS $0.059
NEW ZEALAND $0.000
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

CANARY SEED SECTOR

CANARY SEED SECTOR PROFILE

Production:

Canary seed production was first recorded in Manitoba in 1963 when 1,500 acres were harvested and 800,000 pounds produced. The seeded area rose in the 1960s and 1970s, doubling to 15,000 acres from 1976 to 1977. The area planted to canary seed was up to 57,000 acres in 1986, but dropped significantly in 1987 because of low prices. Interest in canary seed production continued to wane until 1993 when only 12,000 acres were seeded, but higher prices in 1994 and 1995 encouraged producers to increase the canary seed area to 30,000 acres in those years. In 1996, the area seeded to canary seed more than doubled to a record 65,000 acres, but declined back to 20,000 acres in 1997 due to relatively low prices the year before. The harvested area increased to 45,000 acres in 1998, but dropped back to 15,000 acres in 1999 following the drop in price the previous year. Average crop yields ranged from 500 pounds per acre in 1974 to over 1,330 pounds per acre in 1990. The average yield in 1999, at 1,120 pounds per acre, was down by 8.0 percent from 1998 and 6.9 percent above the 10-year average of 1,048 pounds per acre. The 1999 crop of 16.8 million pounds was valued at $1.9 million compared to 54.8 million pounds valued at $6.4 million in 1998 and a record 74.2 million pounds valued at $11.1 million in 1996. Manitoba, one of three provinces growing canary seed, produced 4.6 percent of the Canadian crop in 1999, down from 10.6 percent in 1998. The major canary seed-producing province is Saskatchewan with smaller amounts being grown in Alberta.

Average prices for the canary seed crop have ranged between $0.07 and $0.20 per pound since 1973. The average price of $0.110 per pound for the 1999 crop was down by 4.3 percent from the previous year's price.

Marketing:

Most of the canary seed is delivered to a cleaning plant in Thunder Bay, where foreign material is removed and the seed cleaned to 98 percent purity (5 percent hulled) for export. The seed is loaded on ships for transportation to Western Europe. Some of the canary seed crop is cleaned by Manitoba plants and shipped directly to the United States and South America. Small amounts are sold to companies in Eastern Canada, from where packaged seed is sent back to Manitoba for the domestic birdseed market.

Processing:

Companies, such as Roy Legumex Inc. in St. Jean-Baptiste and XCAN Grain Pool Ltd., clean and bag canary seed. Some canary seed is mixed with other seed and sold as mixed birdseed in Manitoba.

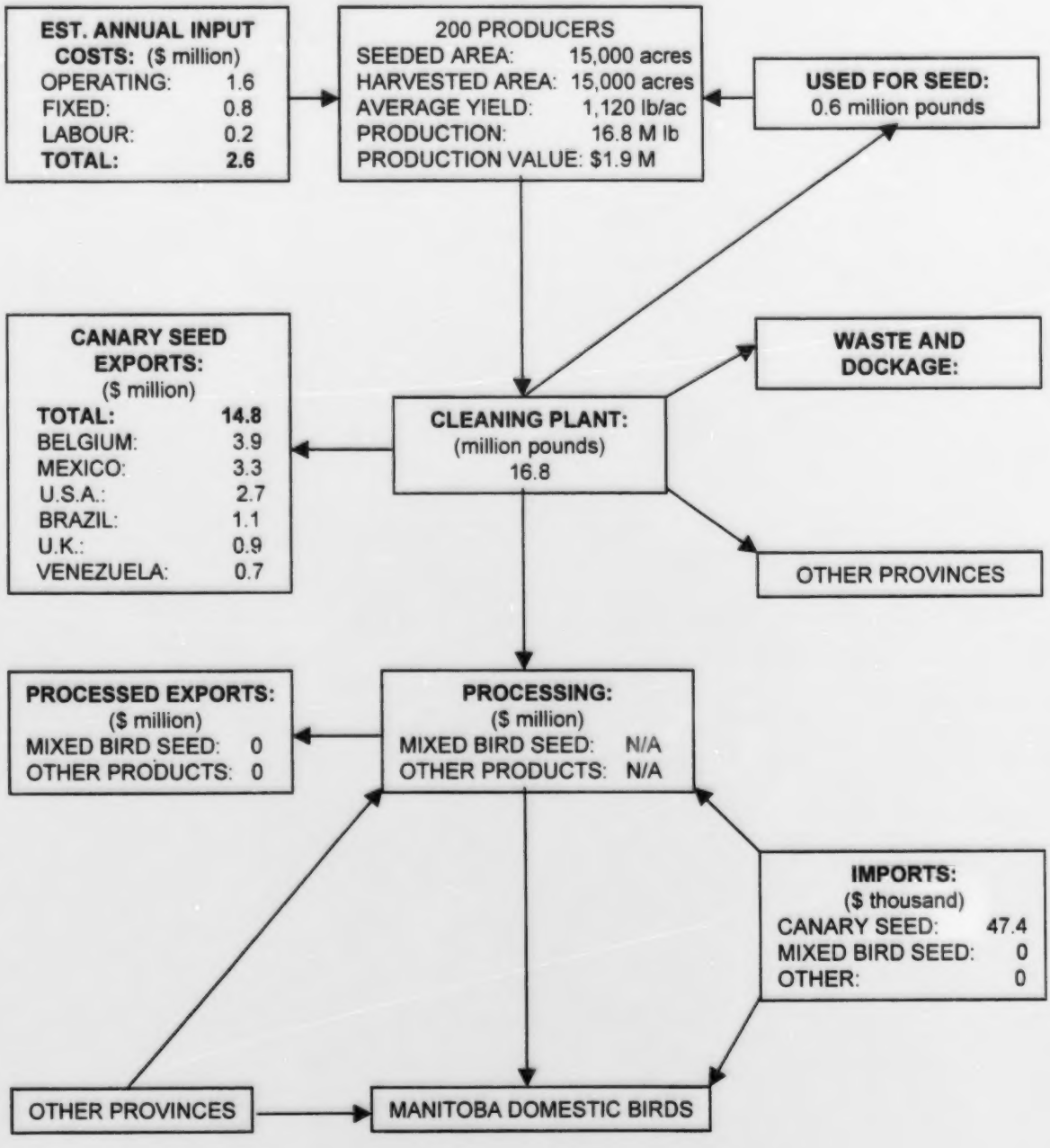
Trade:

In 1999, Manitoba canary seed was exported to 25 countries, such as Belgium, the United States, Mexico, Brazil, United Kingdom and Venezuela. About 46 percent of Manitoba's exports, valued at $14.8 million, went to Western Europe in 1999, down from almost two-thirds in 1997. Manitoba imported a small amount of canary seed from the United States, valued at $47,400 in 1999.

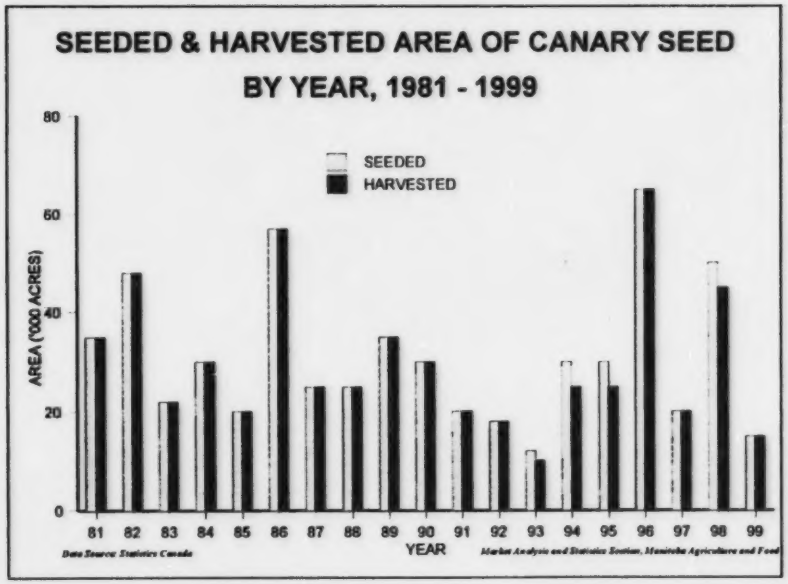
CANARY SEED SECTOR

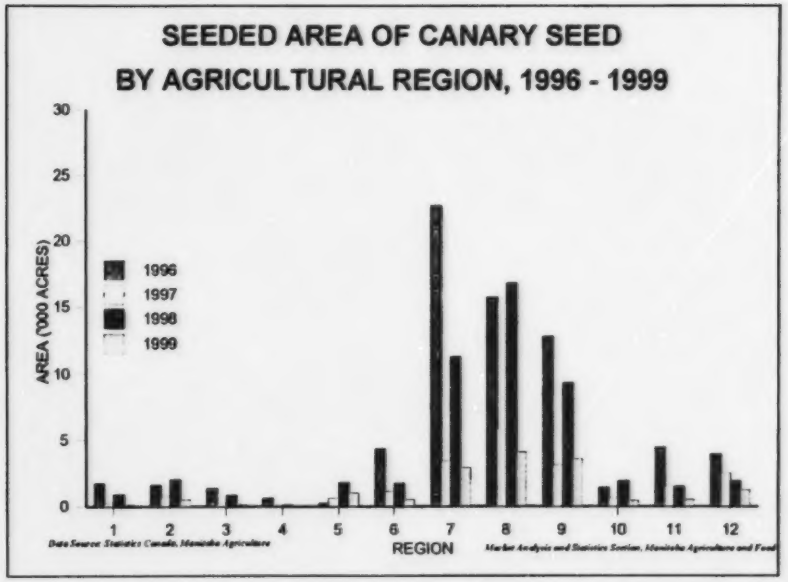
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	424	200	400	200	50
CROP PRODUCTION:					
Seeded Area ('000 acres):	65.0	20.0	50.0	15.0	30
% of Canada	11.6	7.1	9.6	4.1	
Harvested Area ('000 acres):	65.0	20.0	45.0	15.0	33
Yield/acre (pounds)	1,140	1,020	1,218	1,120	92
Production (million lb):	74.2	20.3	54.8	16.8	31
% of Canada	12.6	8.0	10.6	4.6	
Average Price ($/lb):	0.150	0.147	0.115	0.110	96
VALUE OF PRODUCTION ($ million):	11.1	3.0	6.4	1.9	30
ESTIMATED TOTAL EXPENSES ($/acre):	168.06	161.20	164.82	172.64	105
CASH RECEIPTS ($ million):	7.7	4.4	4.0	3.3	83
% of Canada	9.4	9.1	9.9	8.1	
EXPORTS ($ million):	18.3	16.9	12.6	14.8	117
Cleaned Canary Seed	18.3	16.9	12.6	14.8	117
Mixed bird seed	0	0	0	0	
IMPORTS ($ thousand):	52.6	1.8	83.3	47.4	57
Cleaned Canary Seed	52.6	1.8	83.3	47.4	57
Mixed bird seed	0	0	0	0	

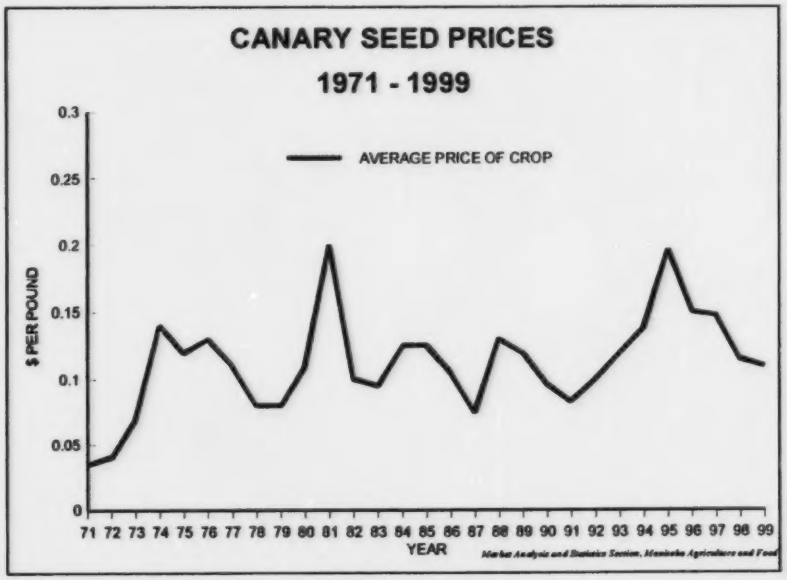
CANARY SEED INDUSTRY CHART, 1999

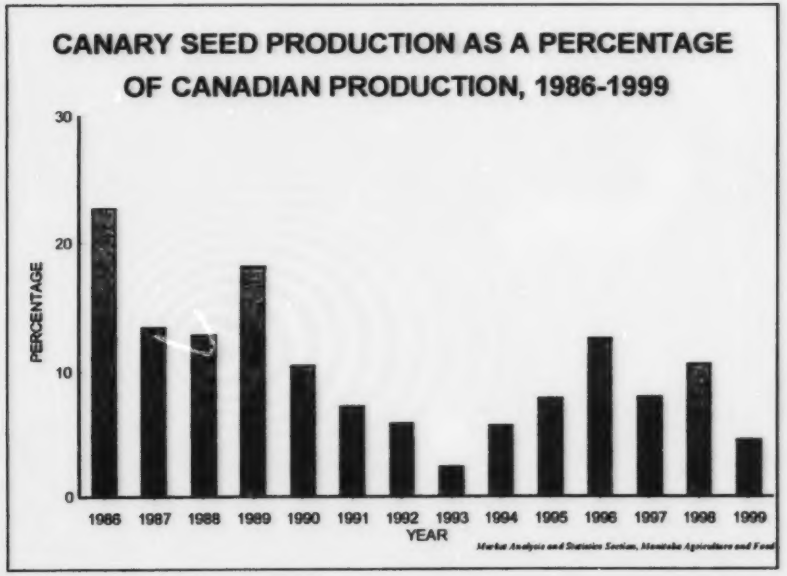


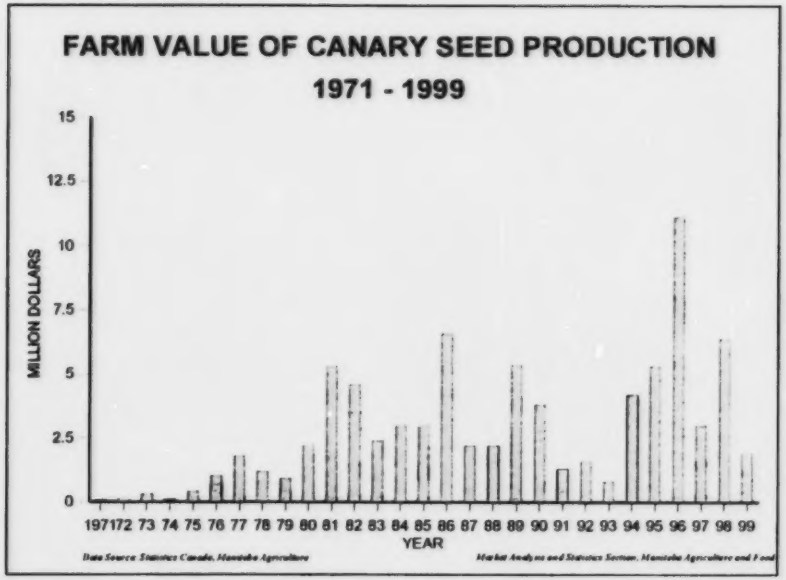
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

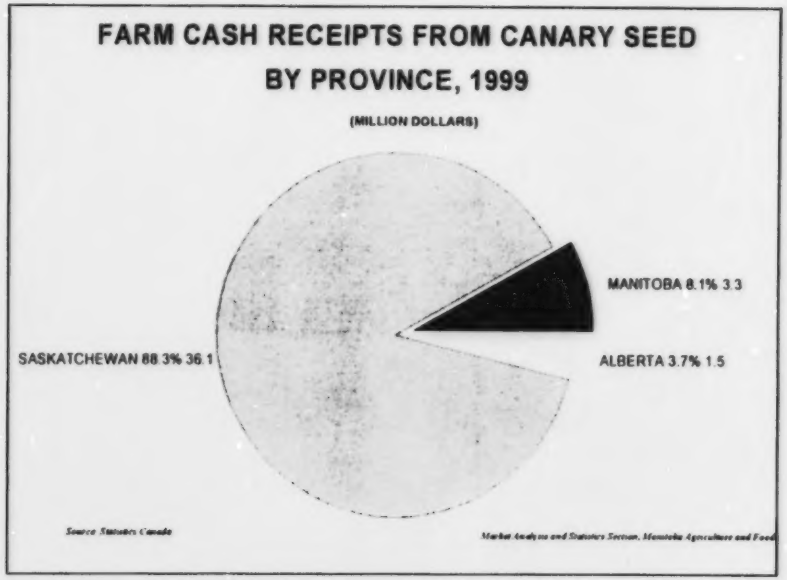

SEEDED & HARVESTED AREA OF CANARY SEED
BY YEAR, 1981 - 1999
SEEDED
HARVESTED
AREA ('000 ACRES)
0
20
40
60
80
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

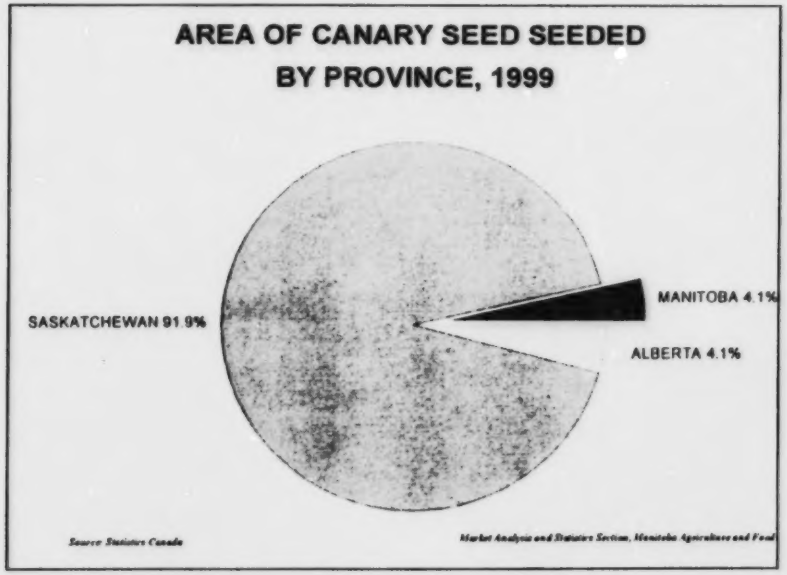

SEEDED AREA OF CANARY SEED
BY AGRICULTURAL REGION, 1996 - 1999
1996
1997
1998
1999
AREA ('000 ACRES)
0
5
10
15
20
25
30
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

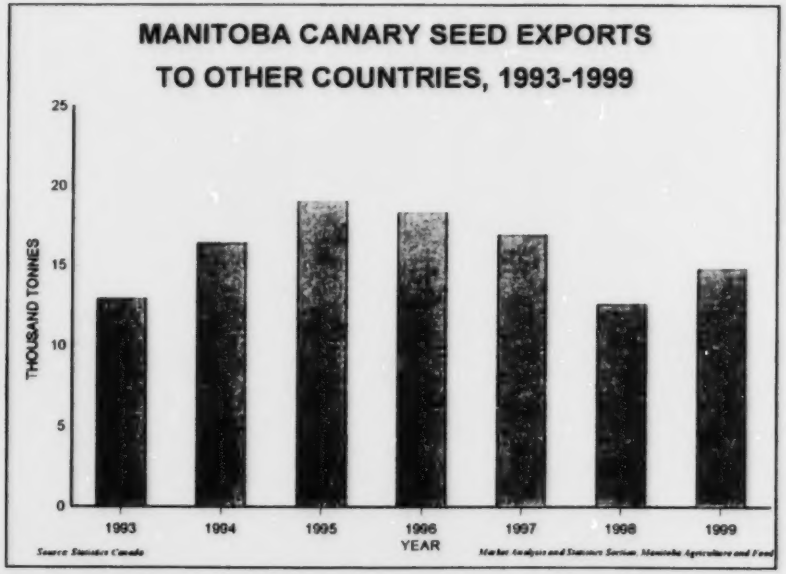

CANARY SEED PRICES
1971 - 1999
AVERAGE PRICE OF CROP
$ PER POUND
0
0.05
0.1
0.15
0.2
0.25
0.3
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

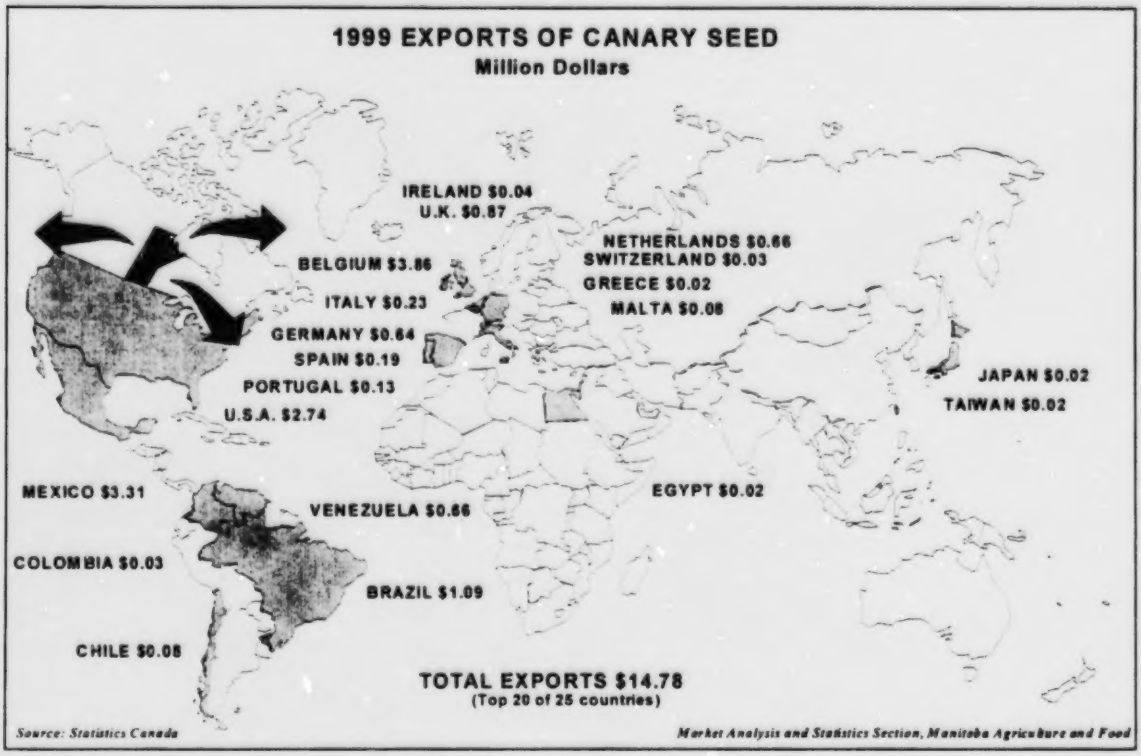

CANARY SEED PRODUCTION AS A PERCENTAGE
OF CANADIAN PRODUCTION, 1986-1999
PERCENTAGE
0
10
20
30
1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

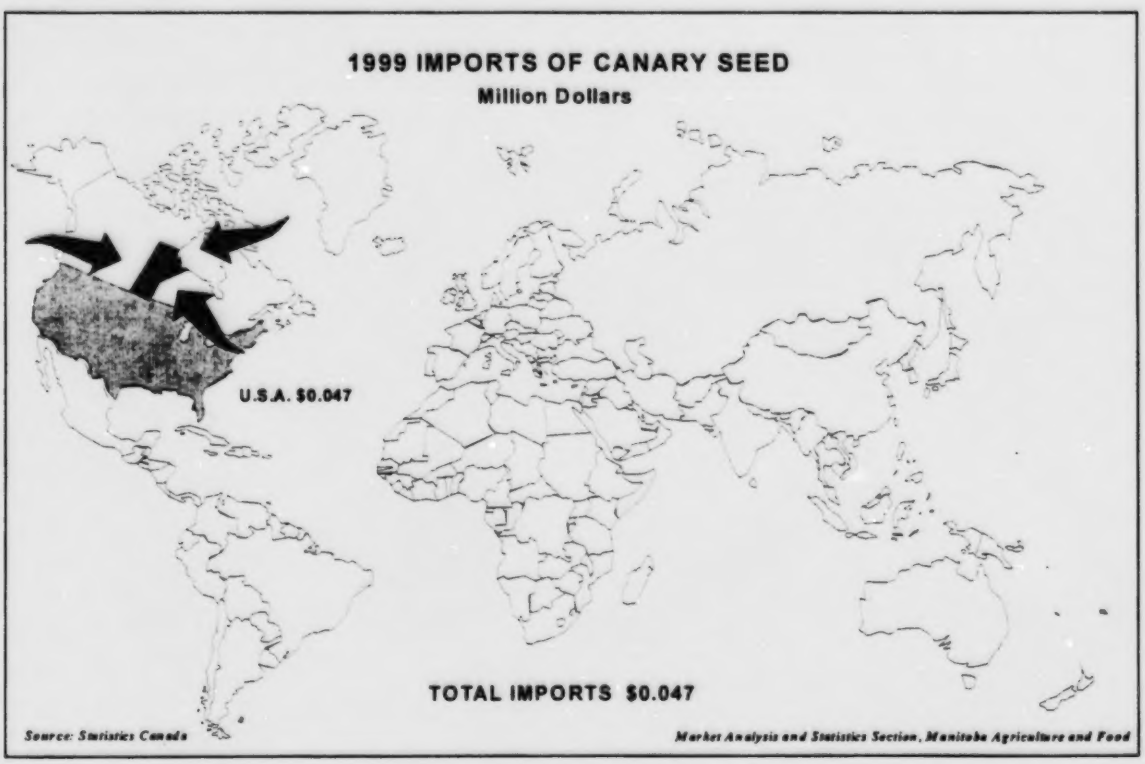

FARM VALUE OF CANARY SEED PRODUCTION
1971 - 1999
MILLION DOLLARS
15
12.5
10
7.5
5
2.5
0
1971 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food


FARM CASH RECEIPTS FROM CANARY SEED
BY PROVINCE, 1999
(MILLION DOLLARS)
MANITOBA 8.1% 3.3
SASKATCHEWAN 88.3% 36.1
ALBERTA 3.7% 1.5
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


AREA OF CANARY SEED SEEDED
BY PROVINCE, 1999
SASKATCHEWAN 91.9%
MANITOBA 4.1%
ALBERTA 4.1%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


MANITOBA CANARY SEED EXPORTS
TO OTHER COUNTRIES, 1993-1999
THOUSAND TONNES
25
20
15
10
5
0
1993
1994
1995
1996
1997
1998
1999
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 EXPORTS OF CANARY SEED
Million Dollars
IRELAND $0.04
U.K. $0.87
NETHERLANDS $0.66
SWITZERLAND $0.03
BELGIUM $3.86
GREECE $0.02
ITALY $0.23
MALTA $0.08
GERMANY $0.64
SPAIN $0.19
JAPAN $0.02
PORTUGAL $0.13
TAIWAN $0.02
U.S.A. $2.74
MEXICO $3.31
VENEZUELA $0.66
EGYPT $0.02
COLOMBIA $0.03
BRAZIL $1.09
CHILE $0.08
TOTAL EXPORTS $14.78
(Top 20 of 25 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF CANARY SEED
Million Dollars
U.S.A. $0.047
TOTAL IMPORTS $0.047
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

DRY BEAN SECTOR

DRY BEAN SECTOR PROFILE

Production:

Commercial production of dry beans began in the mid-1960s in Manitoba with 100 acres seeded and harvested in 1963. By 1981, the seeded area had increased to 19,300 acres with further significant increases occurring in the mid-1990s. There are agronomic benefits to dry bean production as well as net returns, which are at least comparable to wheat production. A record 170,000 acres of dry beans were seeded and harvested in 1999, an increase of 70 percent from the previous record in 1998, when the seeded area was 100,000 acres. Almost 60 percent of the bean area was seeded to white pea/navy beans with most of the remaining area seeded to pinto beans and smaller areas in dark red kidney, cranberry or black beans. Average dry bean yields were highest at 1,670 pounds per acre in 1994. Yields, averaging 1,580 pounds per acre in 1999, were down by less than one percent from 1998, but 21.2 percent above the 10-year average of 1,304 pounds per acre. Production and crop value peaked in 1999 at 268.0 million pounds and $59.0 million respectively, up from 159.0 million pounds and $37.2 million in 1998. These were well above the 10-year averages of 93 million pounds and $22.1 million.

Manitoba, the largest producer of dry beans in the country, produced 42.7 percent of the Canadian dry bean crop in 1999, up from 39.0 percent in 1998. About 36 percent of the national dry bean crop is grown in Ontario, with the remainder produced in Alberta with smaller amounts in Quebec. Ontario focuses on white pea beans, while Alberta grows coloured beans.

Over the last twenty years, average dry bean prices have ranged between $0.15 and $0.40 per pound. The average price of $0.22 per pound for the 1999 crop was down from $0.243 per pound the previous year.

Marketing:

Annual farm cash receipts for the sector rose from $13.6 million in 1996 to $41.7 million in 1999. Manitoba's contribution to Canadian dry bean receipts increased from 7.5 percent in 1993 to almost 40 percent in 1994, declined to 23 percent in 1995, but rose to 36.3 percent in 1999.

In 1999, Manitoba marketed white pea/navy beans (51% of Canadian area), pinto beans (56% of Canadian area), dark red kidney beans (9%), light red kidney beans (53%), cranberry beans, also called romano, speckled or sugar beans, (12%), small red, red Mexican or adzuki beans (42%) and black or black turtle beans (62%), all for human consumption.

Processing:

Companies such as United Grain Growers Ltd. and W.H. Escott Co. Ltd. in Winnipeg do cleaning and bagging of dry beans. Beans are mixed with other legumes for sale as dry soup bases by companies such as Eidse Family Farms in Morris and Glenlochar Kitchens in Miniota.

Trade:

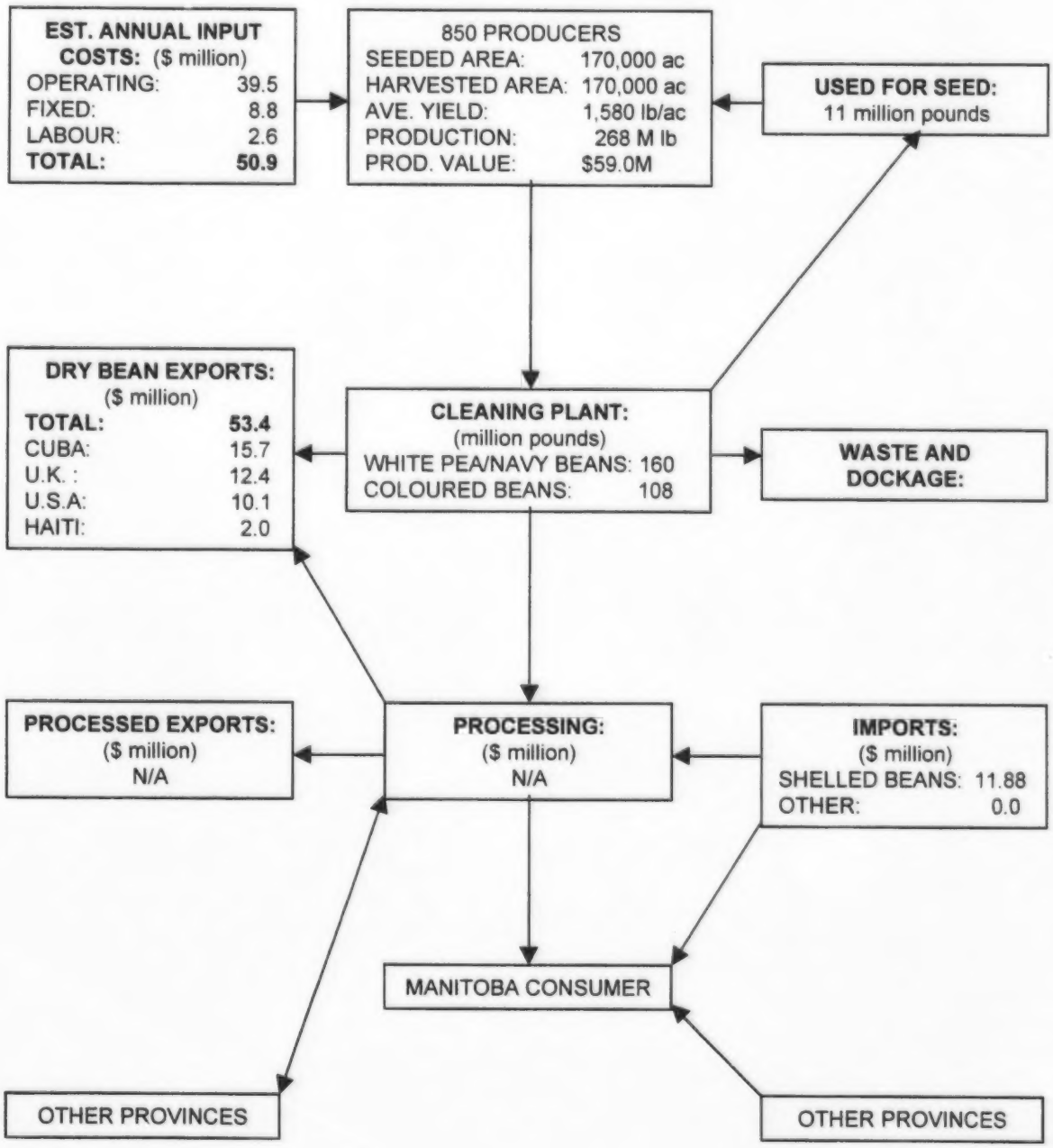
Manitoba's beans may be shipped to canneries in Eastern Canada for processing into products such as soups and pork and beans, but most beans are exported. About $53.4 million of the dry beans sold out of province in 1999 were expcrted to 43 countries such as Cuba, United States, United Kingdom and Haiti.

Manitoba imported about $11.9 million of dry beans in 1999, mostly from the U.S.

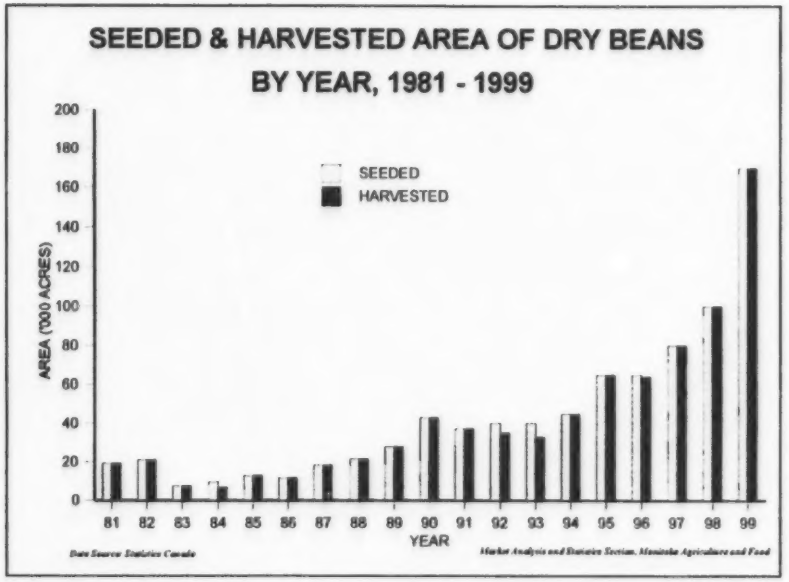
DRY BEANS AND DRY BEAN PRODUCTS SECTOR

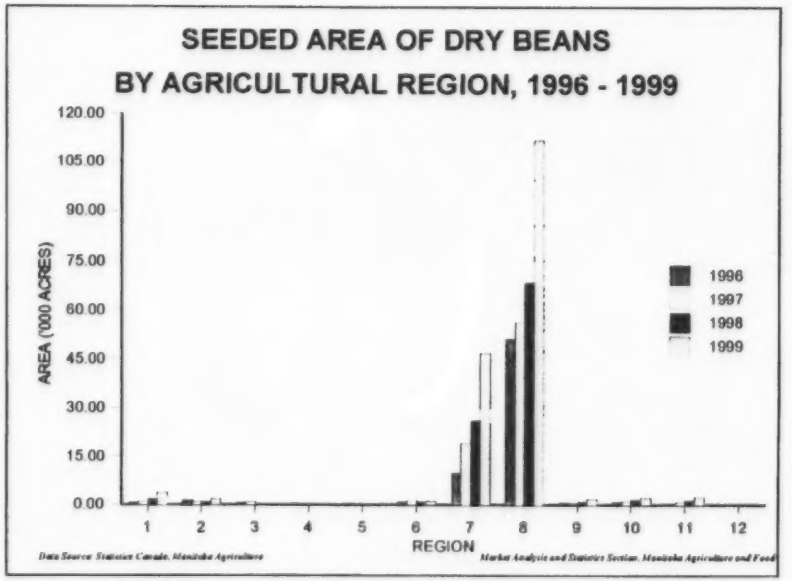
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	400	400	500	850	170
CROP PRODUCTION:					
Seeded Area ('000 acres):					
All beans	65	80	100	170	170
% of Canada	34.4	36.8	43.1	45.9	
White beans/Navy beans	33	50	50	100	200
Coloured beans	32	30	50	70	140
Harvested Area ('000 acres):	64.2	80	100	170	170
White beans/Navy beans	32.7	50	50	100	200
Coloured beans	31.5	30	50	70	140
Yield/acre (pounds):	1,330	1,315	1,590	1,580	99
White Pea beans/Navy beans	1,275	1,400	1,600	1,600	100
Coloured beans	1,433	1,167	1,580	1,540	97
Production (million pounds):					
All beans	85.2	105.0	159	268	169
% of Canada	32.8	29.7	39.0	42.7	
White Pea beans/Navy beans	42.1	70.1	80	160	200
Coloured beans	43.0	35.2	79	108	137
Average Price ($/pound):	0.281	0.250	0.243	0.220	91
VALUE OF PRODUCTION ($ million):	23.9	26.3	37.2	59.0	159
ESTIMATED TOTAL EXPENSES ($/acre):	246.29	285.63	311.10	299.38	96
CASH RECEIPTS ($ million):	13.6	14.2	30.5	41.7	137
% of Canada	19.2	22.9	34.0	36.3	
EXPORTS ($ million):	18.7	14.7	25.4	53.4	210
Dry, shelled beans	18.7	14.7	25.4	53.4	210
IMPORTS ($ million):	0.6	1.7	4.1	11.9	292
Dry, shelled beans	0.6	1.7	4.1	11.9	292

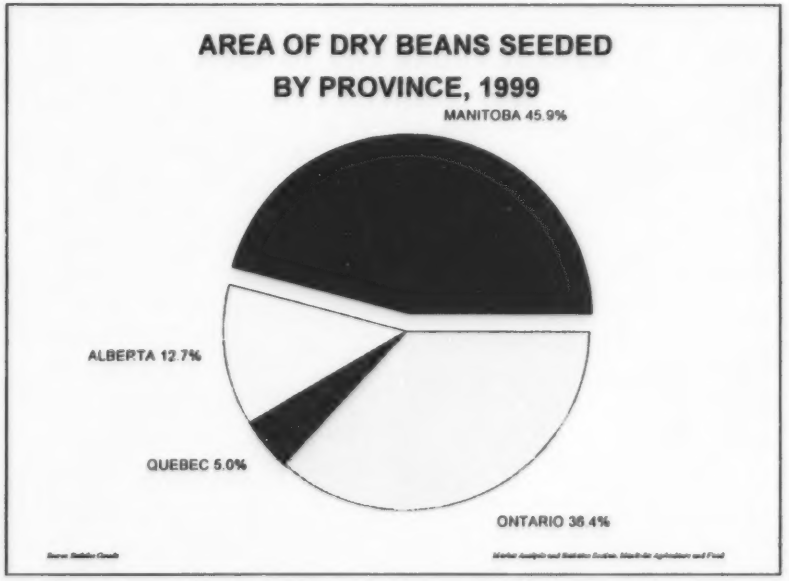
DRY BEAN INDUSTRY CHART, 1999

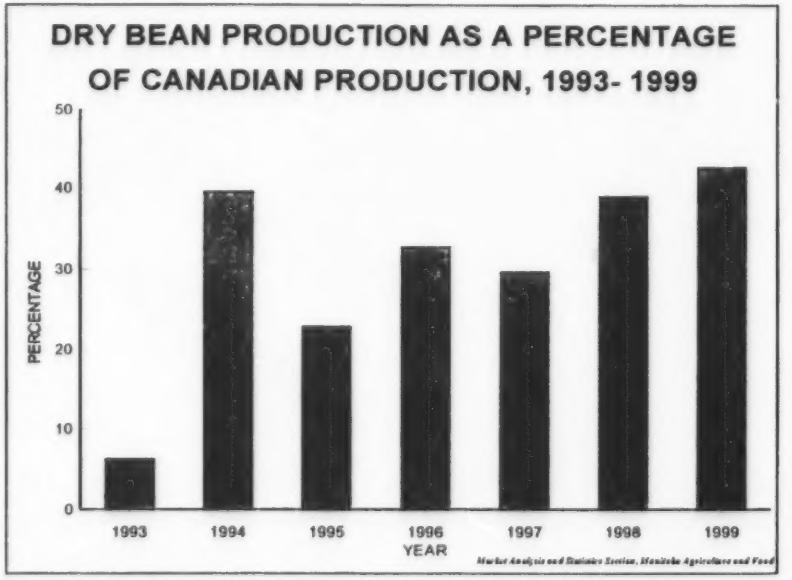


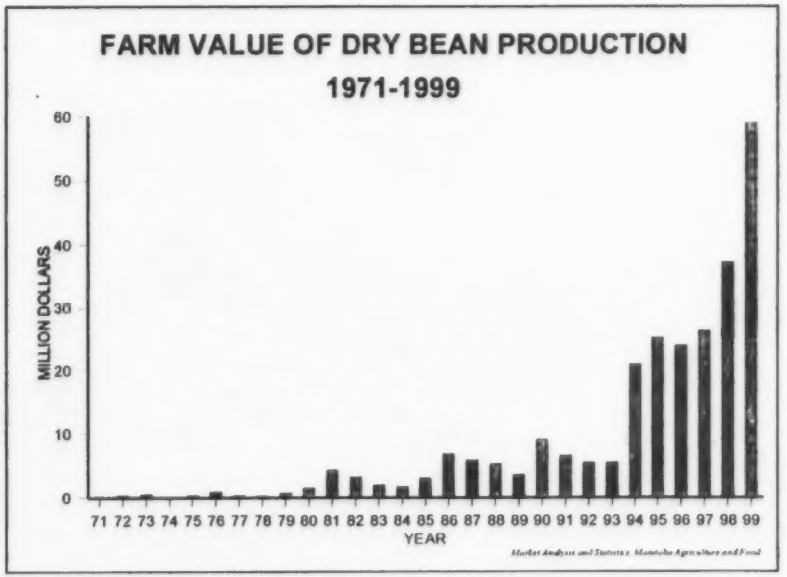
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

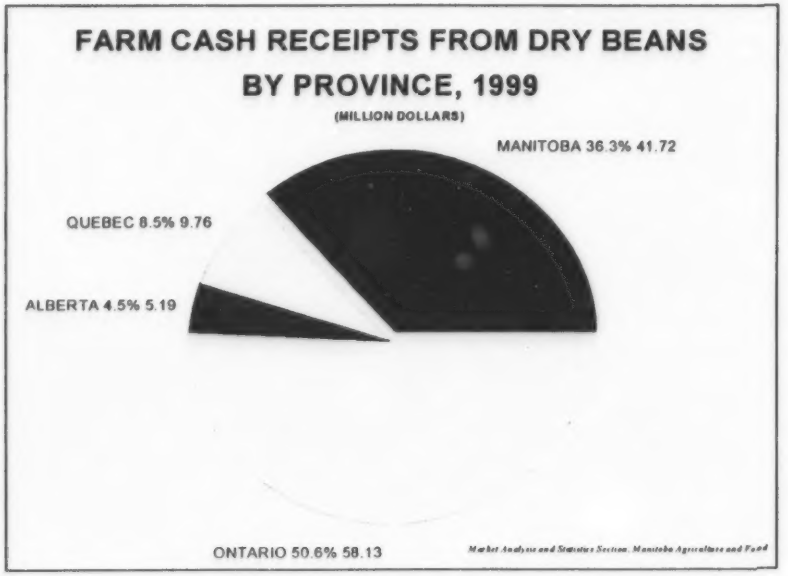

SEEDED & HARVESTED AREA OF DRY BEANS
BY YEAR, 1981 - 1999
SEEDED
HARVESTED
AREA ('000 ACRES)
200
180
160
140
120
100
80
60
40
20
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR

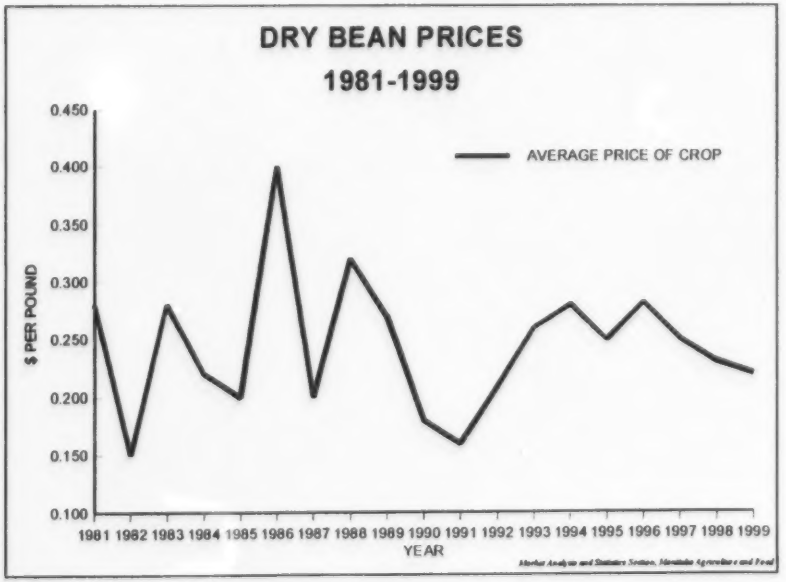

SEEDED AREA OF DRY BEANS
BY AGRICULTURAL REGION, 1996 - 1999
AREA ('000 ACRES)
120.00
105.00
90.00
75.00
60.00
45.00
30.00
15.00
0.00
1996
1997
1998
1999
1 2 3 4 5 6 7 8 9 10 11 12
REGION


AREA OF DRY BEANS SEEDED
BY PROVINCE, 1999
MANITOBA 45.9%
ALBERTA 12.7%
QUEBEC 5.0%
ONTARIO 36.4%

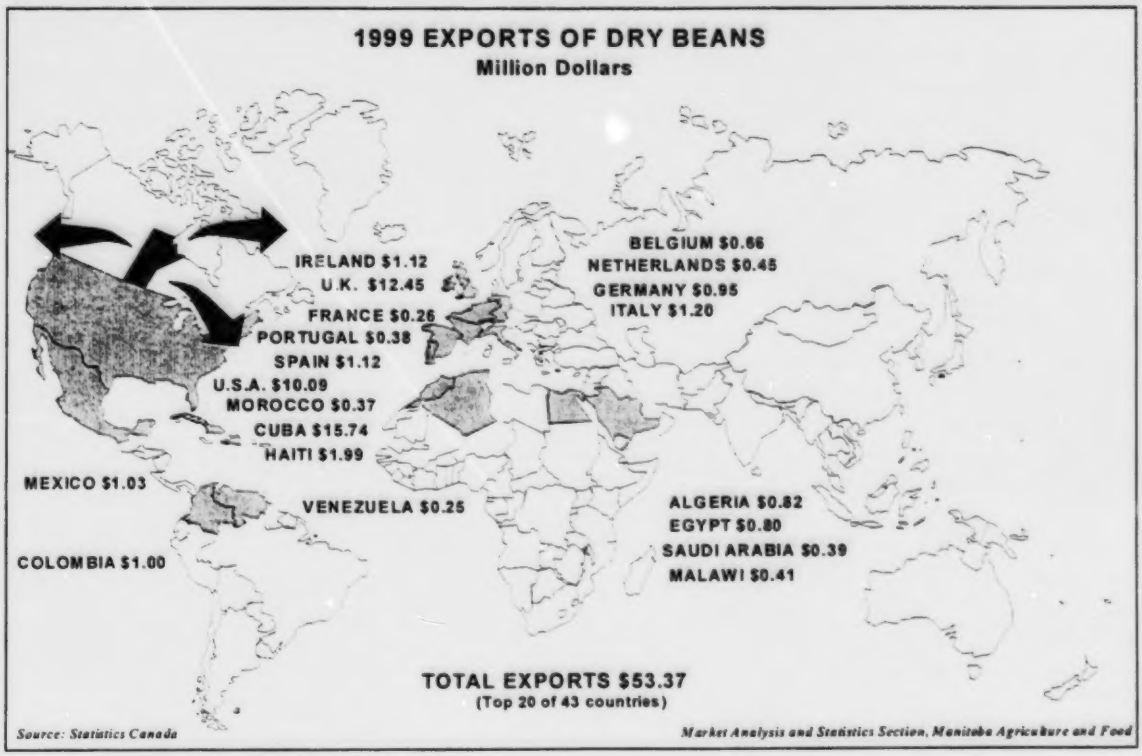

DRY BEAN PRODUCTION AS A PERCENTAGE
OF CANADIAN PRODUCTION, 1993- 1999
PERCENTAGE
50
40
30
20
10
0
1993 1994 1995 1996 1997 1998 1999
YEAR

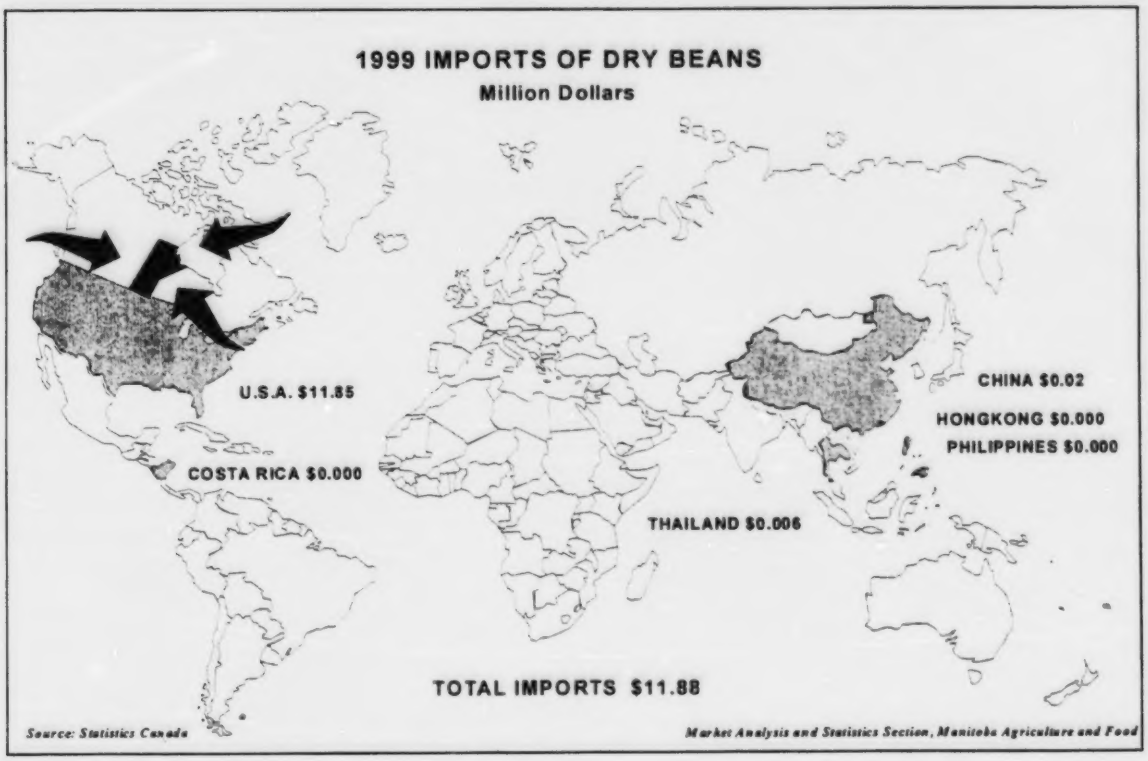

FARM VALUE OF DRY BEAN PRODUCTION
1971-1999
MILLION DOLLARS
0
10
20
30
40
50
60
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR


FARM CASH RECEIPTS FROM DRY BEANS
BY PROVINCE, 1999
(MILLION DOLLARS)
MANITOBA 36.3% 41.72
QUEBEC 8.5% 9.76
ALBERTA 4.5% 5.19
ONTARIO 50.6% 58.13


DRY BEAN PRICES
1981-1999
AVERAGE PRICE OF CROP
$ PER POUND
0.100
0.150
0.200
0.250
0.300
0.350
0.400
0.450
1981 1982 1983 1984 1985 1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999
YEAR

MANITOBA DRY BEAN EXPORTS
TO OTHER COUNTRIES, 1993-1999
THOUSAND TONNES
0
10
20
30
40
50
60
1993
1994
1995
1996
1997
1998
1999
YEAR


1999 EXPORTS OF DRY BEANS
Million Dollars
IRELAND $1.12
U.K. $12.45
FRANCE $0.26
PORTUGAL $0.38
SPAIN $1.12
U.S.A. $10.09
MOROCCO $0.37
CUBA $15.74
HAITI $1.99
MEXICO $1.03
VENEZUELA $0.25
COLOMBIA $1.00
BELGIUM $0.66
NETHERLANDS $0.45
GERMANY $0.95
ITALY $1.20
ALGERIA $0.82
EGYPT $0.80
SAUDI ARABIA $0.39
MALAWI $0.41
TOTAL EXPORTS $53.37
(Top 20 of 43 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF DRY BEANS
Million Dollars
U.S.A. $11.85
COSTA RICA $0.000
CHINA $0.02
HONGKONG $0.000
PHILIPPINES $0.000
THAILAND $0.006
TOTAL IMPORTS $11.88
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

DRY PEA SECTOR

DRY PEA SECTOR PROFILE

Production:

Although Manitoba producers grew dry peas between 1908 and 1912, the seeded area was less than 2,000 acres. There was little to no dry pea production during the First World War, but production started again in 1919. Over the past 80 years, the area seeded to peas varied from as low as 500 acres in 1931 to as high as 260,000 acres in 1998.

Harvested area and production of the crop were record high in 1998 with 255,000 acres and 8.3 million bushels respectively, but declined to 95,000 acres and 3.4 million bushels in 1999. About 67 percent of Manitoba's 1999 pea plantings were yellow pea varieties, about 29 percent were green with the balance sown to other feed types. Dry pea yields were highest at 37.0 bushels per acre in 1985. Yields in 1998 and 1999, at 32.5 and 35.6 bushels per acre were high relative to the 10-year average of 30.6 bushels per acre.

Manitoba produced 4.1 percent of the Western Canadian dry pea crop in 1999, down from 21.6 percent in 1992. There are agronomic benefits to dry pea production. Up until 1998, net returns were at least comparable to wheat production. While the focus in earlier years was on food-quality peas, now much of the crop is used for feed. Peas are not grown in Eastern Canada.

Average dry pea prices have ranged between $3.81 and $6.80 per bushel since 1973. The average price of $3.81 per bushel for the 1999 crop was down by 5 percent from 1998. The value of dry pea production declined from $33.2 million in 1998 to $12.9 million in 1999 due to lower production and prices. Unprofitable prices had discouraged many producers from growing peas.

Estimated farm expenses for dry pea production, including operating, labour and fixed costs, increased from $167.46 per acre in 1995 to $211.80 per acre in 1998, but declined to $195.42 per acre in 1999. Lower overall expenses in the mid-1990s were partly due to the land expense component, which decreased on average, as production became less concentrated in south-central areas of the province.

Marketing:

Annual cash receipts for the sector increased from $12.2 million in 1993 to $27.7 million in 1998, but fell to $16.2 million in 1999. Manitoba's contribution to Canadian dry pea receipts fell from 23.3 percent in 1992 to 10.1 percent in 1998 and 6.2 percent in 1999. Manitoba markets primarily yellow peas for food and livestock feed along with smaller amounts of green peas.

Processing:

Peas are cleaned, split and bagged by companies such as XCAN Grain Pool Ltd, United Grain Growers Ltd. and W. H. Escott Co. Ltd. in Winnipeg and Roy Legumex Inc and Sabourin Seed Service Ltd. in St. Jean-Baptiste. The main processor of peas in Manitoba was Woodstone Foods Corp., which produced whole peas, split peas, pea flour, protein, starch and fibre as well as fat replacers. The company closed at the end of 1996, but reopened in the spring of 1997 under Parrish and Heimbecker. The P. & H. plant in Saskatoon is to supply 500 tonnes per year of pea starch and protein for further refining at the Manitoba plant. Best Cooking Pulses, Inc. in Portage la Prairie produce fine and coarse pea hull fibre, while Glenlochar Kitchens in Miniota and Eidse Family Farms in Morris produce consumer packages of soup mixes, which include peas. Peas are used in hog rations as an alternative protein source to soy and canola meal.

Trade:

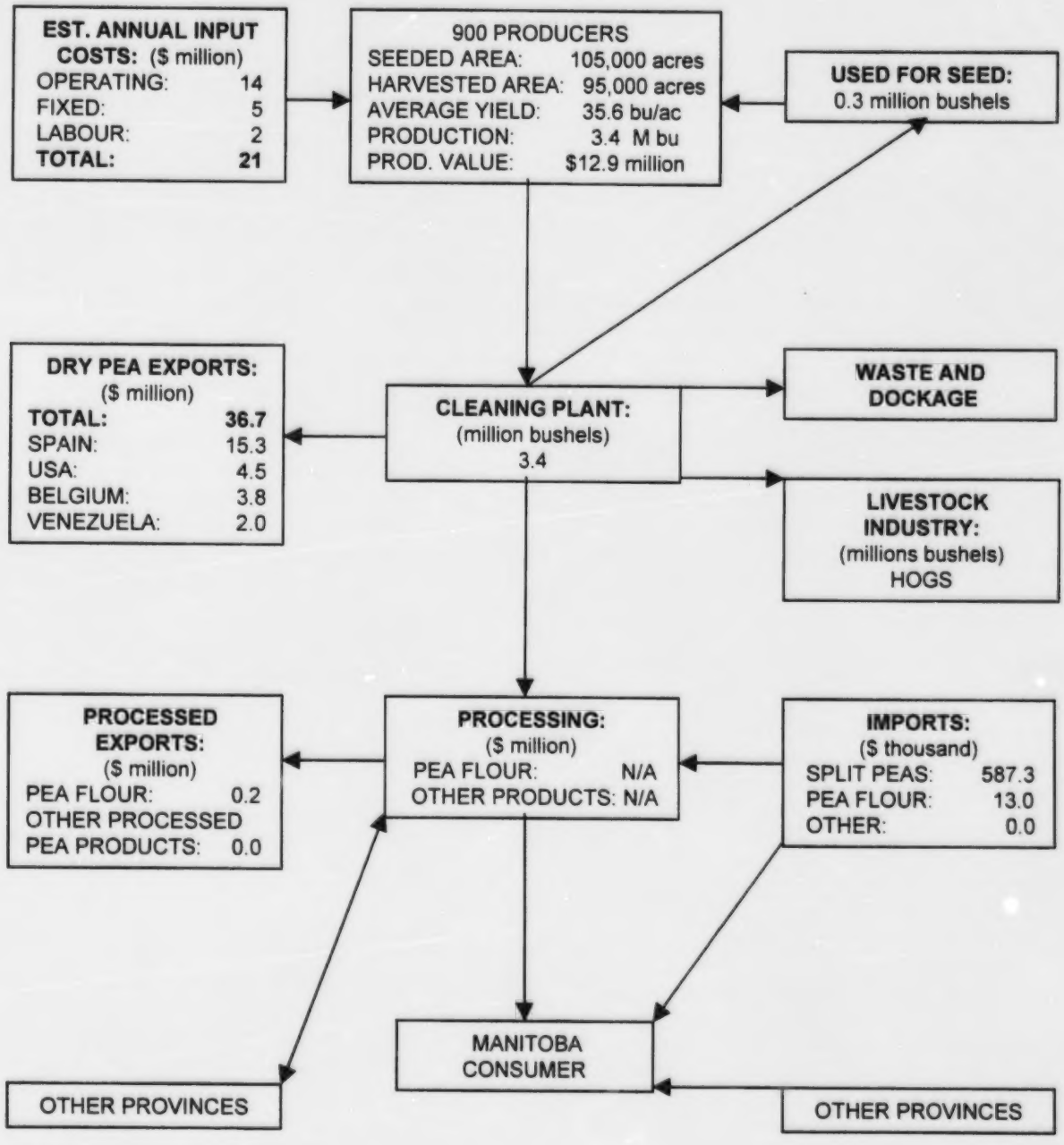
Some of Manitoba's food-quality peas may be shipped to canneries in Eastern Canada, but most of the food pea exports are shipped to countries such as Spain, Belgium, U.S.A. and Venezuela. Dry pea exports amounted to $36.7 million in 1999, a drop of 22 percent from 1998. Small amounts of pea flour are exported to countries such as the United States and Belgium.

Manitoba imported about $587,300 of split peas in 1999, mostly from the United States.

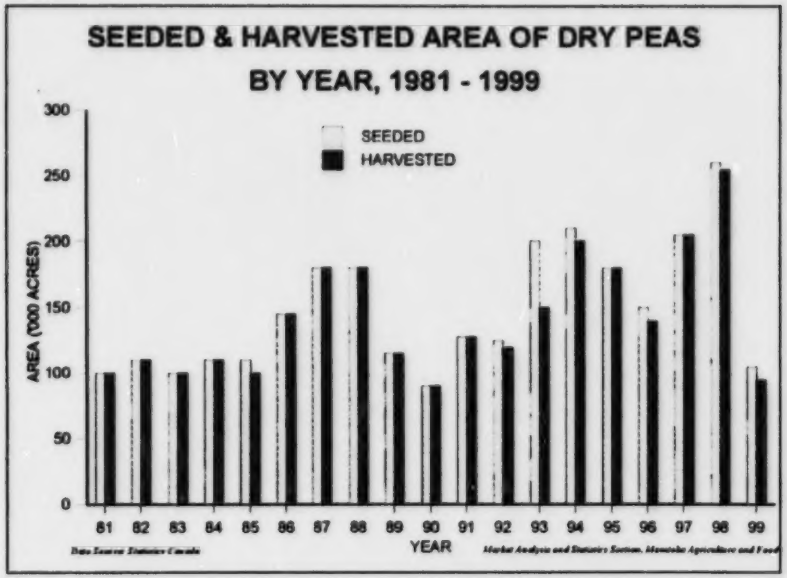
DRY PEAS AND DRY PEA PRODUCTS SECTOR

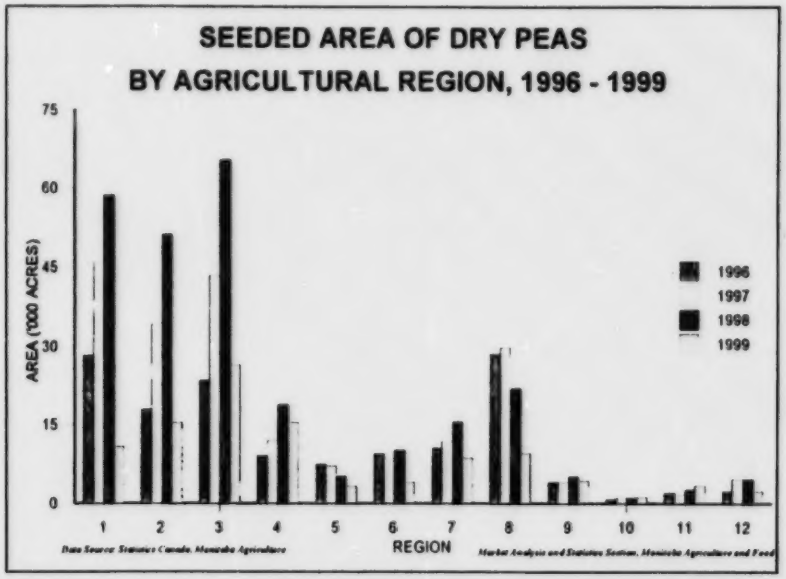
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	980	1,000	1,200	900	75
CROP PRODUCTION:					
Seeded Area ('000 acres):	145	205	260	105	40
% of Canada	10.8	9.8	9.7	5.0	
Harvested Area ('000 acres):	140	205	255	95	37
Yield/acre (bushels)	34.6	32.0	32.5	35.6	110
Production (million bu):	4.9	6.6	8.3	3.4	41
% of Canada	11.3	10.1	9.7	4.1	
Average Price ($/bu):	5.96	4.81	4.00	3.81	95
VALUE OF PRODUCTION ($ million):	28.9	31.5	33.2	12.9	39
ESTIMATED TOTAL EXPENSES ($/acre):	186.61	196.70	211.80	195.42	92
CASH RECEIPTS ($ million):	24.5	25.7	27.7	16.2	58
% of Canada	11.2	10.8	10.1	6.2	
CROP DISPOSITION:	5.0	6.7	8.5	3.8	45
Marketings	3.7	5.1	6.2	2.7	44
Seed Requirements	0.5	0.7	0.3	0.4	133
Feed, Waste & Dockage	0.6	0.8	1.6	0.5	31
Carryover, July 31	0.2	0.2	0.4	0.2	50
EXPORTS ($ million):	37.8	75.8	47.5	36.9	78
Dry, shelled peas	37.3	75.7	47.3	36.7	78
Pea meal, flour, etc.	0.5	0.07	0.2	0.2	100
IMPORTS ($ thousand):	333.2	479.8	624.5	600.3	96
Dry, shelled peas	300.1	479.8	624.4	587.3	94
Pea meal, flour, etc.	33.1	0.0	0.0	13.0	

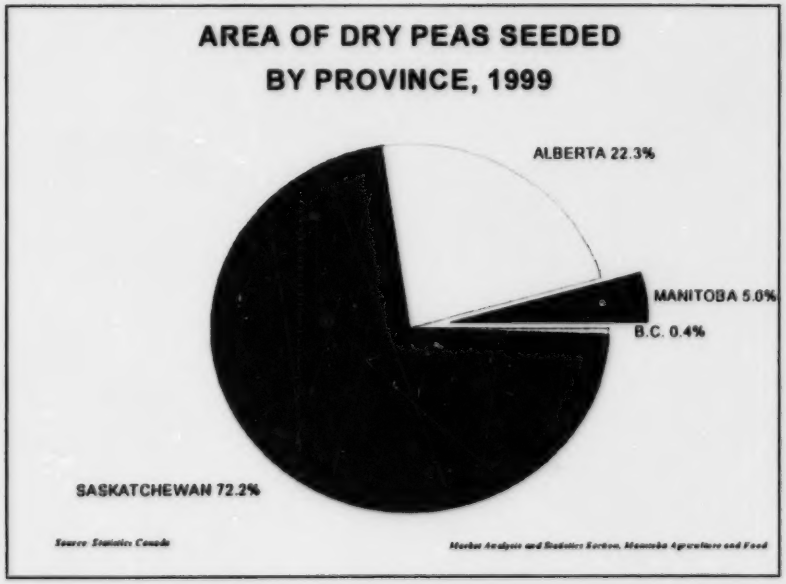
DRY PEA INDUSTRY CHART, 1999

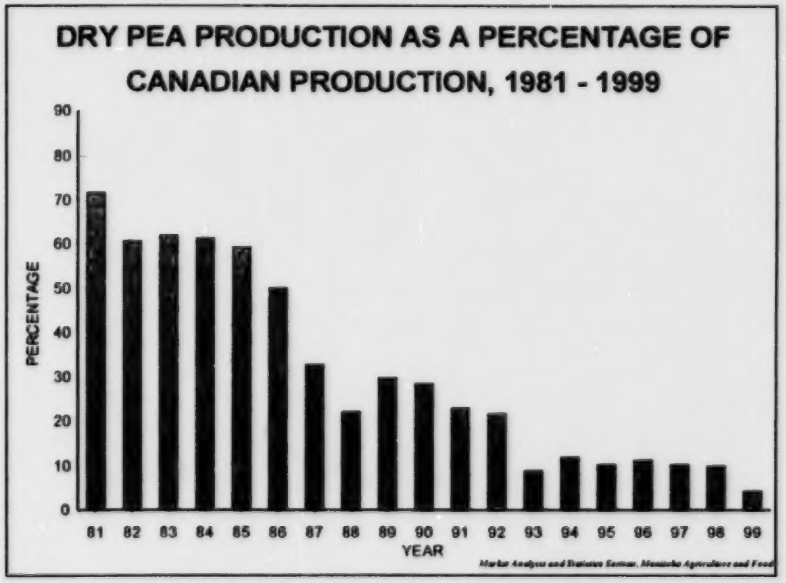


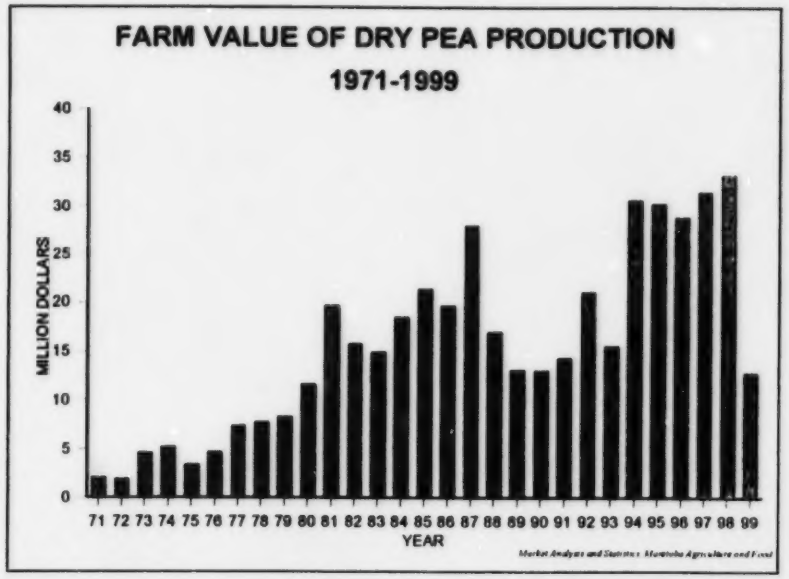
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

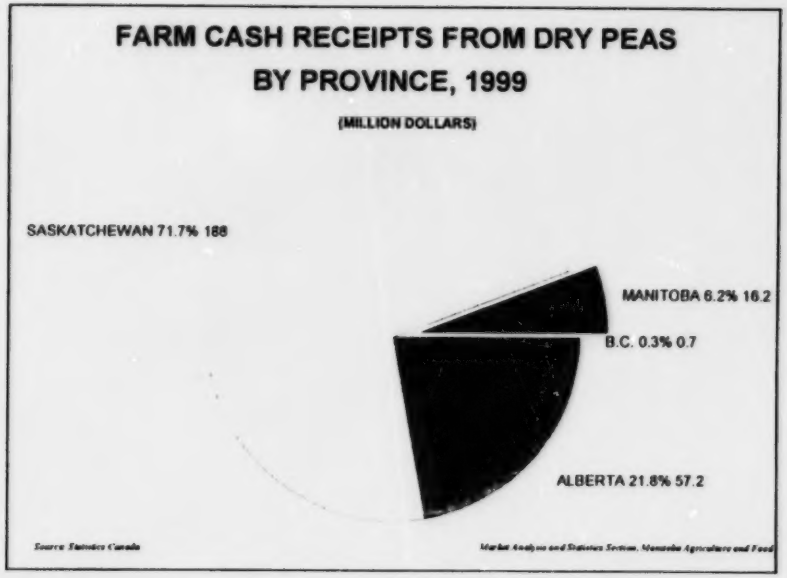

SEEDED & HARVESTED AREA OF DRY PEAS
BY YEAR, 1981 - 1999
SEEDED
HARVESTED
AREA ('000 ACRES)
300
250
200
150
100
50
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR

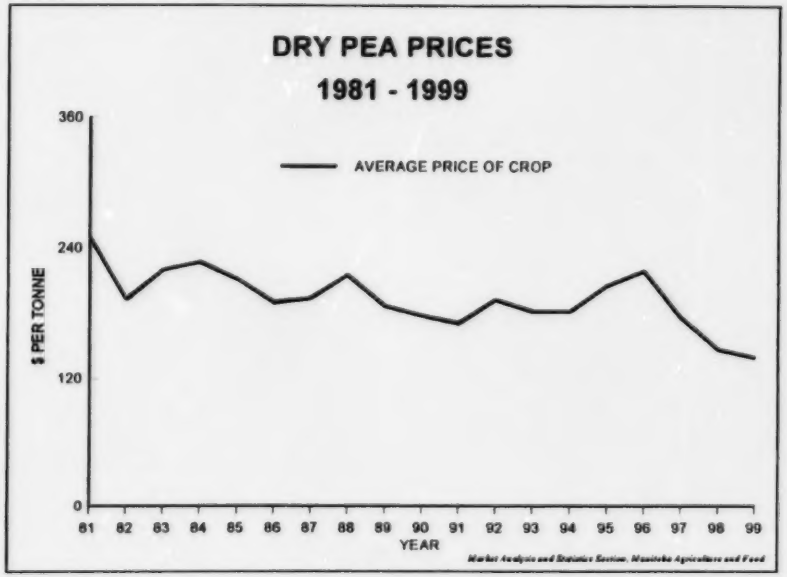

SEEDED AREA OF DRY PEAS
BY AGRICULTURAL REGION, 1996 - 1999
AREA ('000 ACRES)
75
60
45
30
15
0
1996
1997
1998
1999
1 2 3 4 5 6 7 8 9 10 11 12
REGION

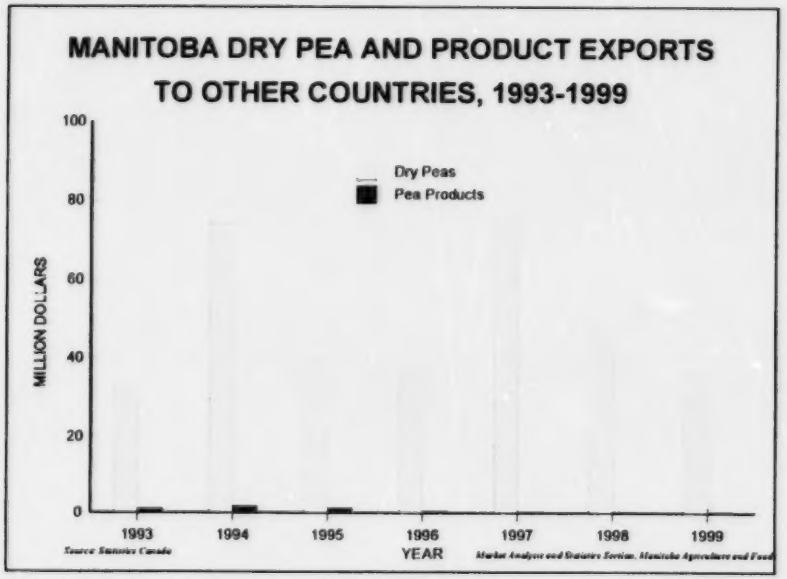

AREA OF DRY PEAS SEEDED
BY PROVINCE, 1999
ALBERTA 22.3%
MANITOBA 5.0%
B.C. 0.4%
SASKATCHEWAN 72.2%

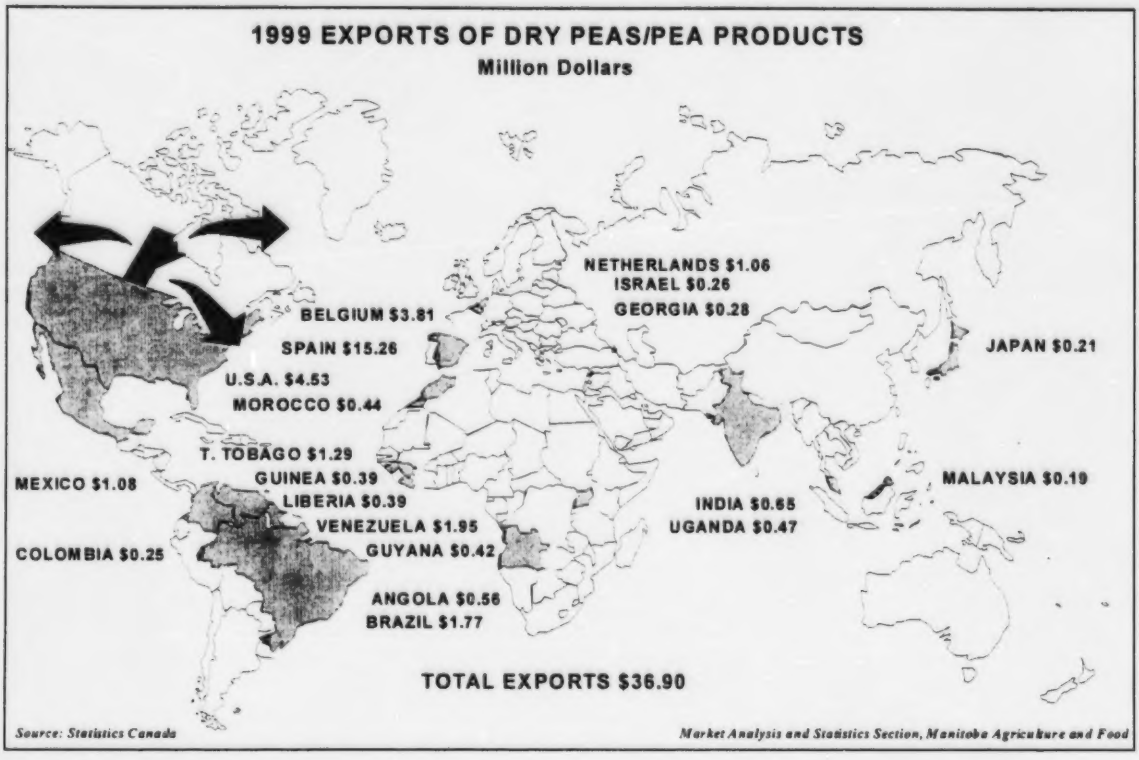

DRY PEA PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981 - 1999
PERCENTAGE
90
80
70
60
50
40
30
20
10
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR

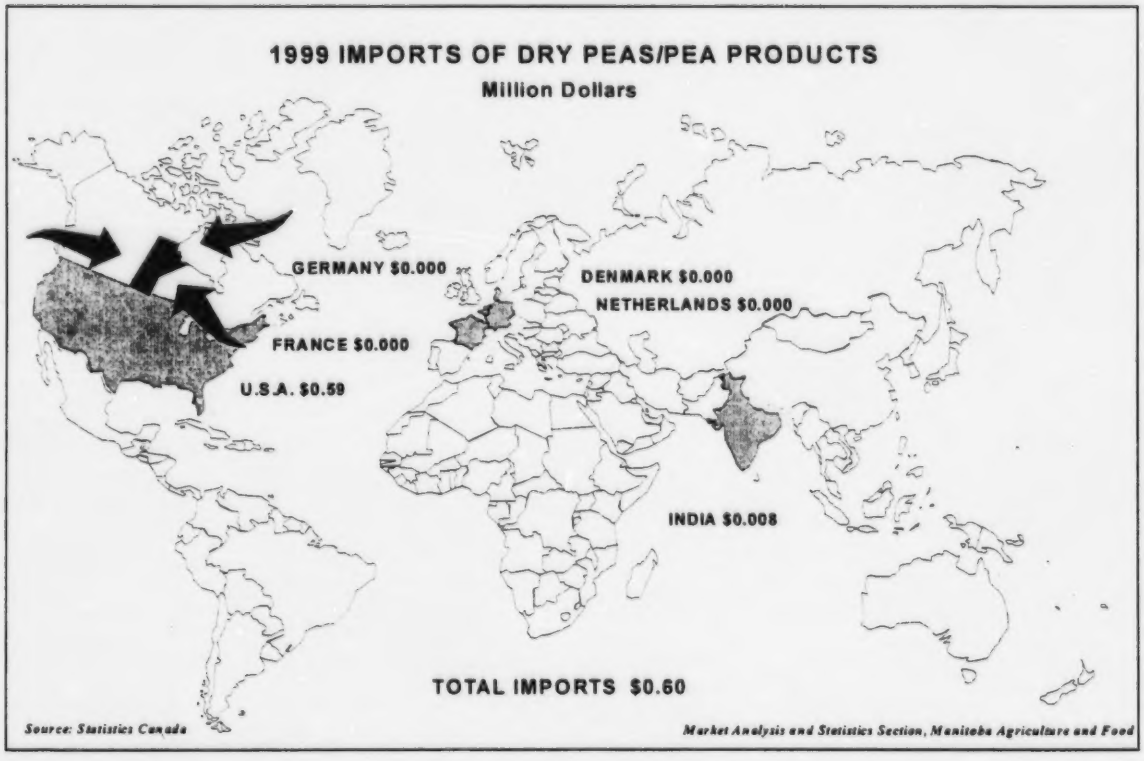

FARM VALUE OF DRY PEA PRODUCTION
1971-1999
MILLION DOLLARS
0
5
10
15
20
25
30
35
40
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR


FARM CASH RECEIPTS FROM DRY PEAS
BY PROVINCE, 1999
(MILLION DOLLARS)
SASKATCHEWAN 71.7% 188
MANITOBA 6.2% 16.2
B.C. 0.3% 0.7
ALBERTA 21.8% 57.2

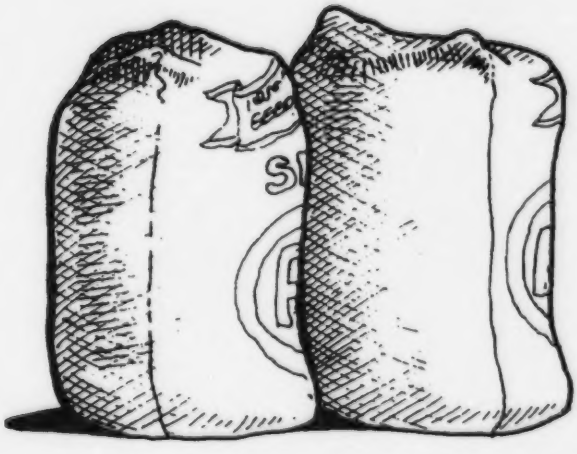

DRY PEA PRICES
1981 - 1999
AVERAGE PRICE OF CROP
$ PER TONNE
0
120
240
360
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR


MANITOBA DRY PEA AND PRODUCT EXPORTS
TO OTHER COUNTRIES, 1993-1999
Dry Peas
Pea Products
MILLION DOLLARS
0
20
40
60
80
100
1993
1994
1995
1996
1997
1998
1999
YEAR


1999 EXPORTS OF DRY PEAS/PEA PRODUCTS
Million Dollars
NETHERLANDS $1.06
ISRAEL $0.26
GEORGIA $0.28
BELGIUM $3.81
SPAIN $15.26
JAPAN $0.21
U.S.A. $4.53
MOROCCO $0.44
T. TOBAGO $1.29
GUINEA $0.39
MEXICO $1.08
LIBERIA $0.39
MALAYSIA $0.19
INDIA $0.65
VENEZUELA $1.95
UGANDA $0.47
COLOMBIA $0.25
GUYANA $0.42
ANGOLA $0.56
BRAZIL $1.77
TOTAL EXPORTS $36.90
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF DRY PEAS/PEA PRODUCTS
Million Dollars
GERMANY $0.000
DENMARK $0.000
NETHERLANDS $0.000
FRANCE $0.000
U.S.A. $0.59
INDIA $0.008
TOTAL IMPORTS $0.60
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

LENTIL SECTOR



LENTIL SECTOR PROFILE

Production:

Commercial production of lentils began in the early 1970s in Manitoba with 2,500 acres seeded and harvested in 1972. By 1979, the seeded area had increased to 17,100 acres with further significant increases occurring in the 1990s. As a legume, lentils are important in crop rotation. A record 155,000 acres of lentils were seeded and harvested in 1992 and produced 175 million pounds of lentils. Uncompetitive prices led to reduced interest in lentil production and the seeded area fell to 8,000 acres in 1997. Prices improved in 1998, which led to 16,000 acres of lentils being seeded in 1999. About 90 percent of Manitoba's lentil plantings were to the smaller Estons with about 8 percent to the larger Lairds and the balance to other types such as speckleds and reds.

Average lentil yields were record high at 1,527 pounds per acre in 1990. Yields averaging 1,450 pounds per acre in 1997 were the second highest on record. Yields declined to 992 pounds per acre in 1998, but rose to 1,290 pounds per acre in 1999. This was 12 percent above the 10-year average of 1,149 pounds per acre. Lentil production, at 19.4 million pounds in 1999, was 50 percent higher than a year earlier.

Manitoba produced about 1.2 percent of the Canadian lentil crop in 1998 and 1999, well below 22.7 percent in 1992. All commercial lentil production takes place on the Prairies with over 96 percent in Saskatchewan. There are almost no lentils produced in Eastern Canada

Over the last twenty years, average lentil prices have ranged between $0.13 and $0.35 per pound. The average price of $0.179 per pound for the 1999 crop was up by 22 percent from the previous year. Farm value of the crop peaked in 1992 at $23.4 million. The value of the 1999 crop was $3.5 million, up from $1.9 million in 1998.

Marketing:

Annual farm cash receipts for the sector rose from $10.0 million in 1994 to $12.4 million in 1995, but declined to $2.7 million in 1999. Manitoba's contribution to Canadian lentil receipts decreased from 10.0 percent in 1994 to 1.4 percent in 1999.

Lentils are a protein-rich food for human consumption, but downgraded product could be used for livestock feed.

Processing:

Cleaning and bagging of lentils are done by companies such as XCAN Grain Pool Ltd., United Grain Growers Ltd. and Vita Health Co. Ltd. in Winnipeg, Roy Legumex Inc. and Sabourin Seed Service Ltd. in St. Jean-Baptiste, Agricore East Special Crops in Carman and Best Cooking Pulses, Inc. in Portage la Prairie. There is little further processing of lentils, but companies such as Glenlochar Kitchens in Miniota and Eidse Family Farms in Morris mix lentils with other legumes and rice for sale as soup and stew bases.

Trade:

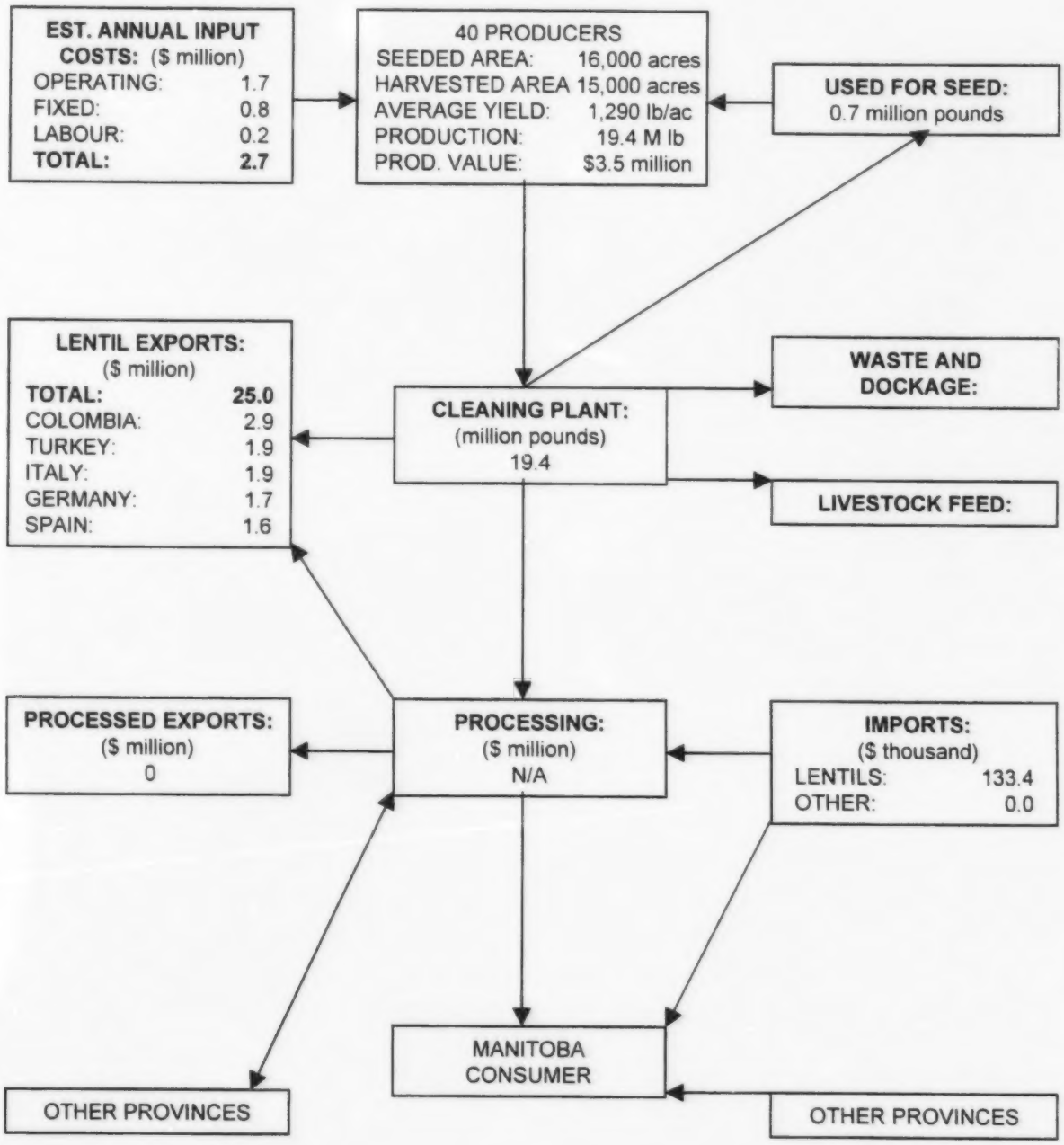
Some of Manitoba's lentils may be shipped to Eastern Canada, but $25.0 million of the lentils sold out of province in 1999 were exported to 47 countries including Colombia, Turkey, Italy, Germany, Spain and Mexico.

Manitoba imported about $133,400 of lentils in 1999, most of which came from Turkey and the United States.

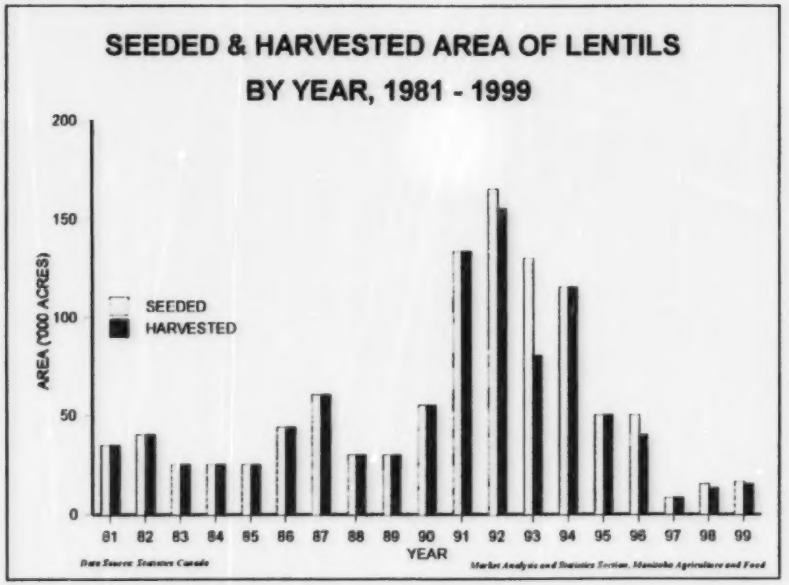
LENTIL SECTOR

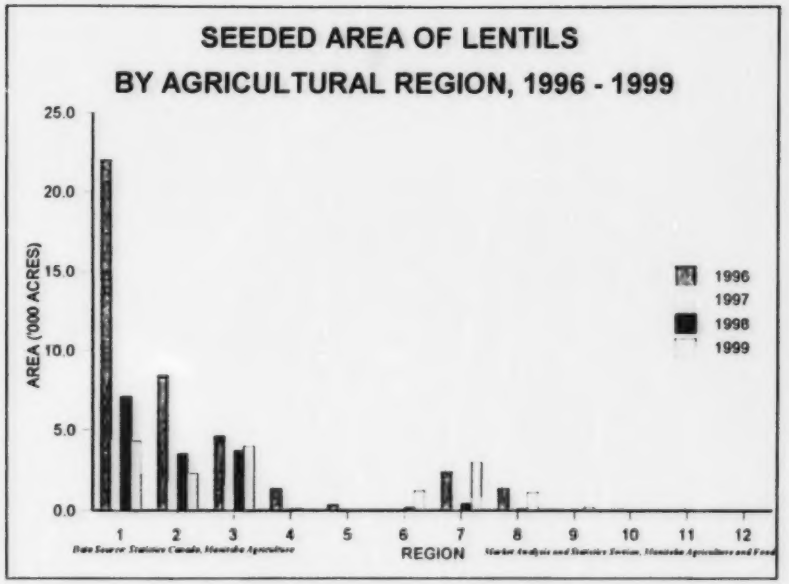
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	200	20	40	40	100
CROP PRODUCTION:					
Seeded Area ('000 acres):	50	8	15	16	107
% of Canada	6.4	1.0	1.6	1.3	
Harvested Area ('000 acres):	39.8	8	13	15	115
Yield/acre (pounds):	1,160	1,450	992	1,290	130
Production (million pounds):	46.3	11.6	12.9	19.4	150
% of Canada	5.0	1.4	1.2	1.2	
Average Price ($/pound):	0.159	0.132	0.147	0.179	122
VALUE OF PRODUCTION ($ million):	7.4	1.6	1.9	3.5	184
ESTIMATED TOTAL EXPENSES ($/acre):	188.28	164.06	178.69	171.96	96
CASH RECEIPTS ($ million):	8.2	4.0	2.4	2.7	113
% of Canada	6.0	4.1	2.0	1.4	
EXPORTS ($ million):	31.9	21.6	20.6	25.0	121
Shelled lentils	31.9	21.6	20.6	25.0	121
IMPORTS ($ thousand):	65.9	73.6	123.6	133.4	108
Shelled lentils	65.9	73.6	123.6	133.4	108

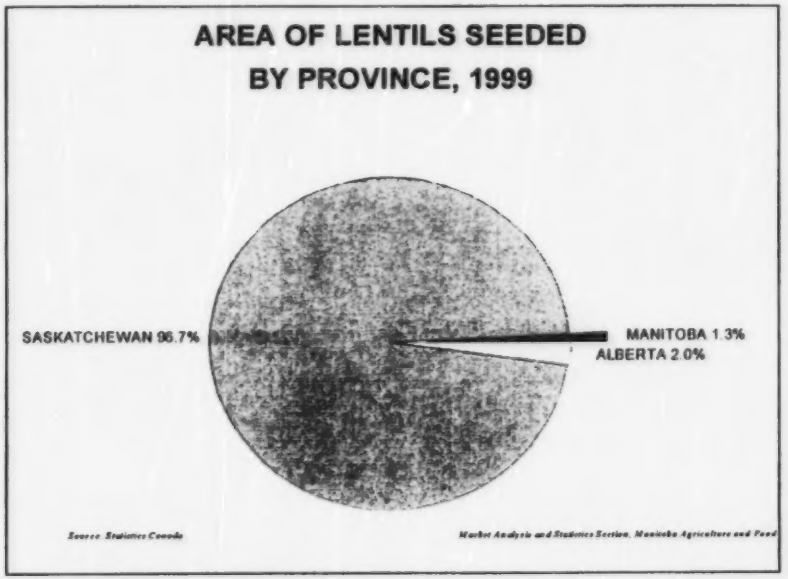
LENTIL INDUSTRY CHART, 1999

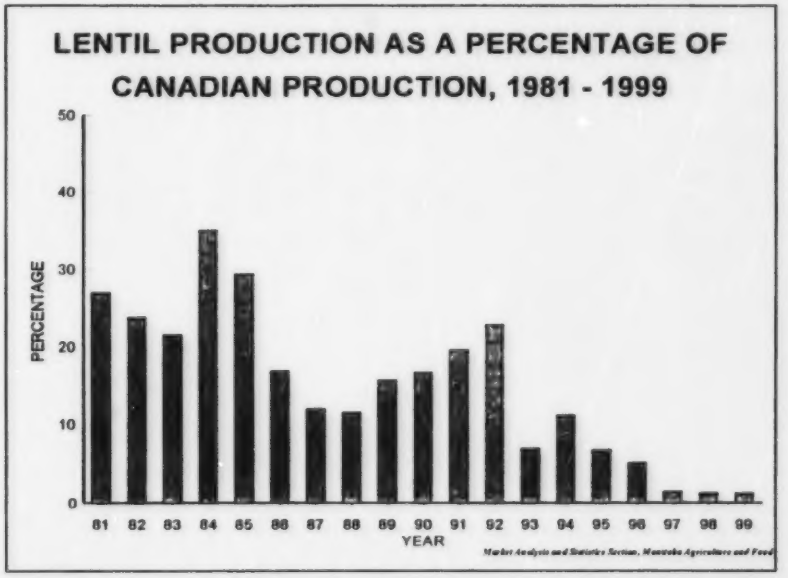


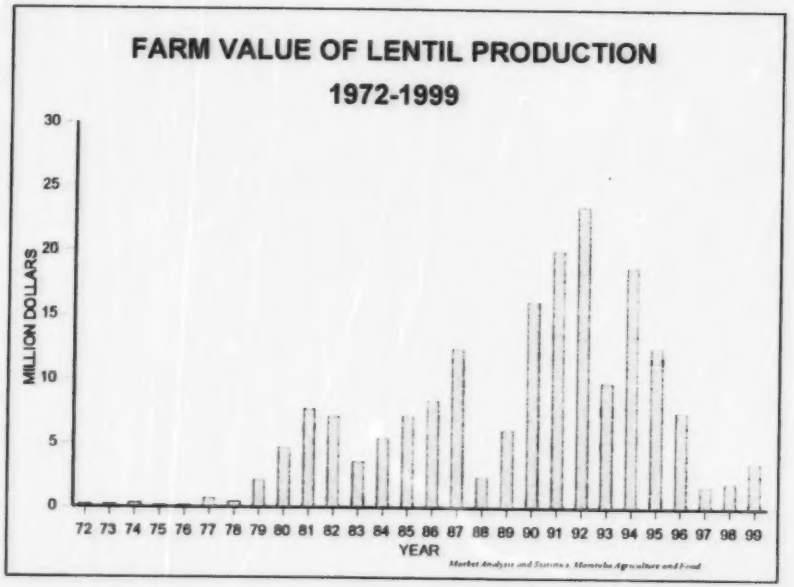
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

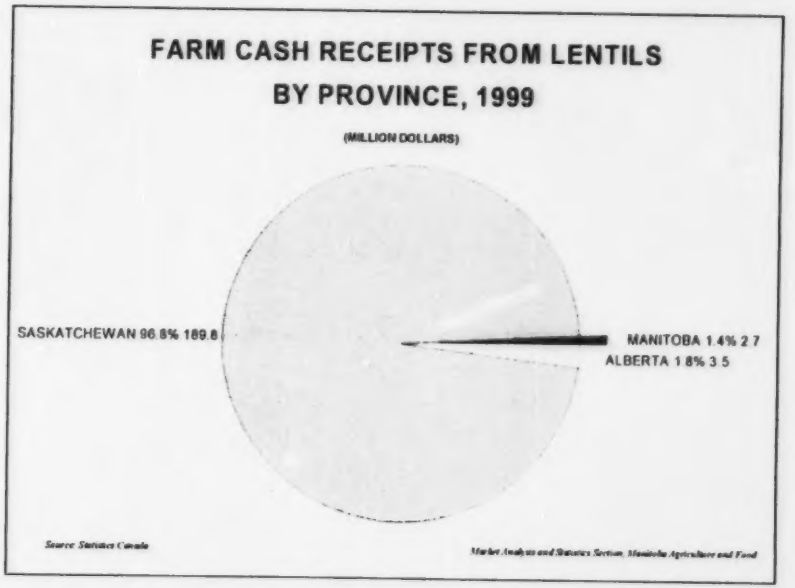

SEEDED & HARVESTED AREA OF LENTILS
BY YEAR, 1981 - 1999
AREA ('000 ACRES)
200
150
100
50
0
SEEDED
HARVESTED
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

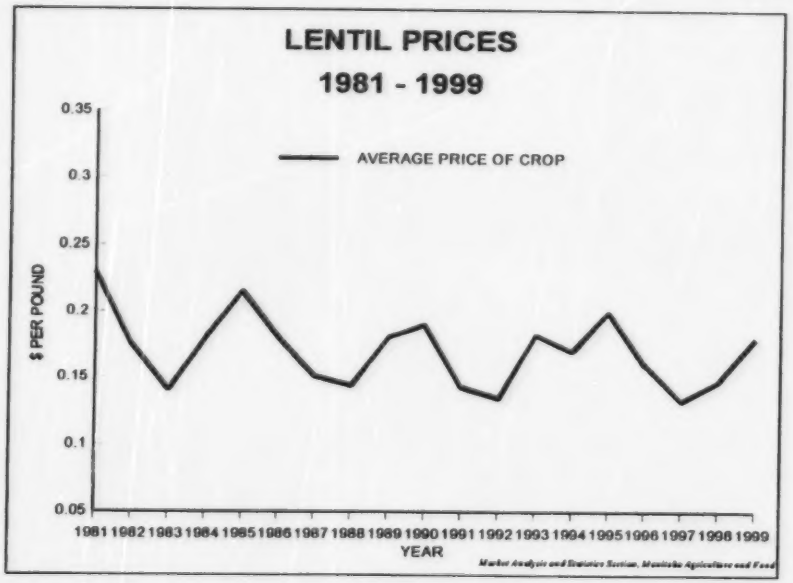

SEEDED AREA OF LENTILS
BY AGRICULTURAL REGION, 1996 - 1999
AREA ('000 ACRES)
25.0
20.0
15.0
10.0
5.0
0.0
1996
1997
1998
1999
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

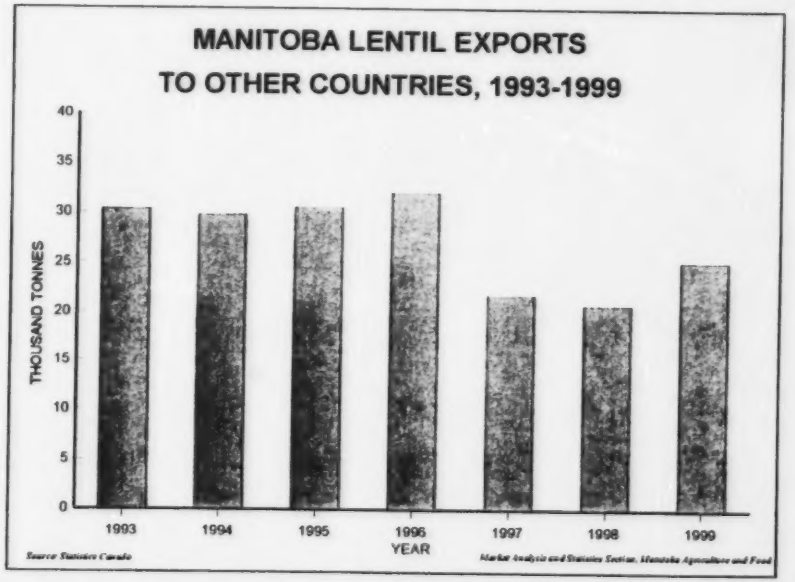

AREA OF LENTILS SEEDED
BY PROVINCE, 1999
SASKATCHEWAN 96.7%
MANITOBA 1.3%
ALBERTA 2.0%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

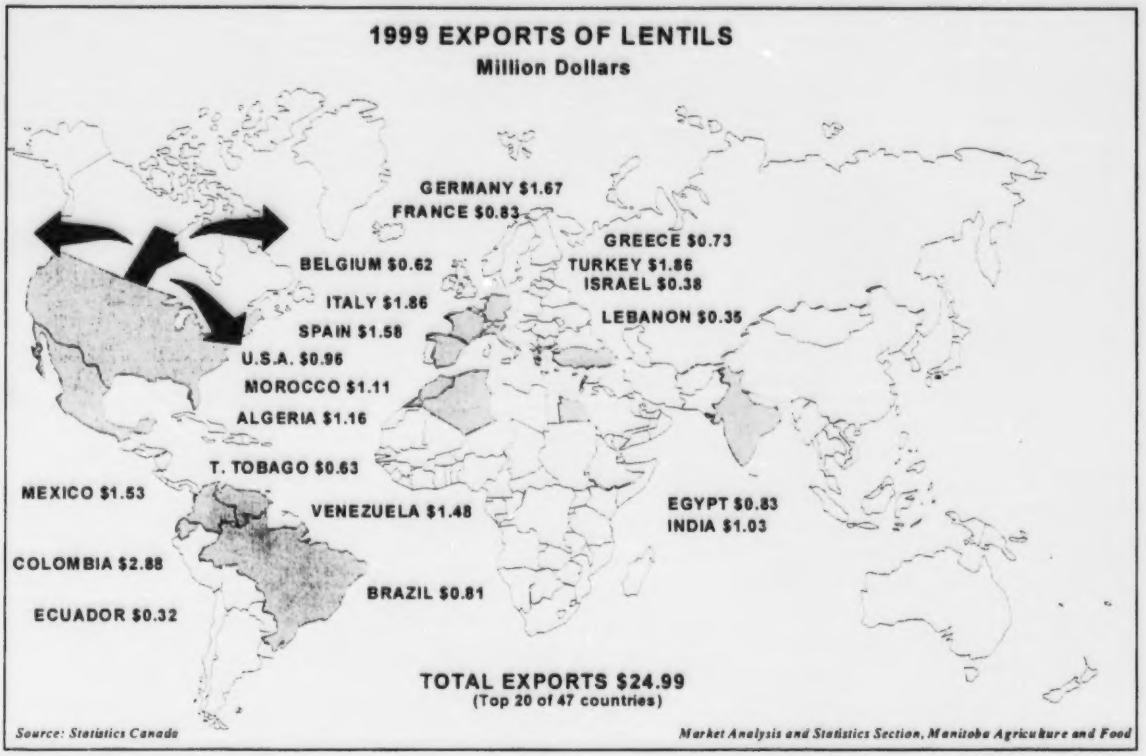

LENTIL PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981 - 1999
PERCENTAGE
50
40
30
20
10
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

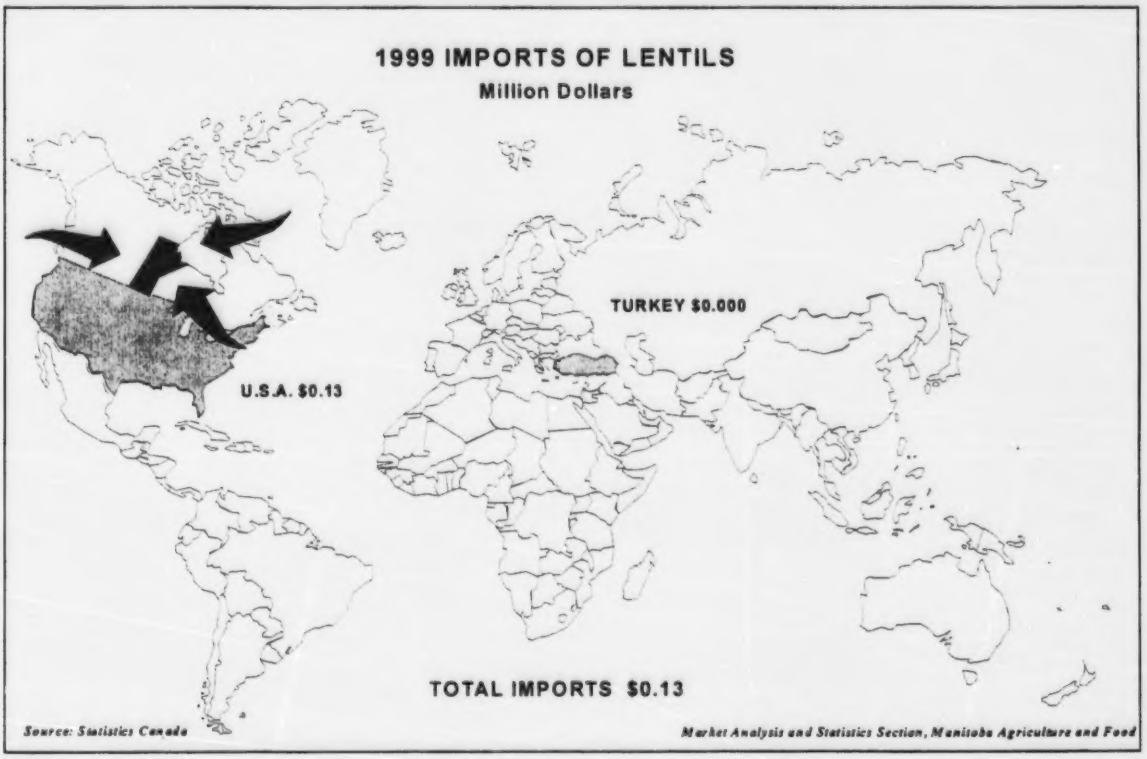

FARM VALUE OF LENTIL PRODUCTION
1972-1999
MILLION DOLLARS
30
25
20
15
10
5
0
72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR


FARM CASH RECEIPTS FROM LENTILS
BY PROVINCE, 1999
(MILLION DOLLARS)
SASKATCHEWAN 96.8% 189.8
MANITOBA 1.4% 2.7
ALBERTA 1.8% 3.5
Source: Statistics Canada


LENTIL PRICES
1981 - 1999
AVERAGE PRICE OF CROP
$ PER POUND
0.35
0.3
0.25
0.2
0.15
0.1
0.05
1981 1982 1983 1984 1985 1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999
YEAR


MANITOBA LENTIL EXPORTS
TO OTHER COUNTRIES, 1993-1999
THOUSAND TONNES
40
35
30
25
20
15
10
5
0
1993
1994
1995
1996
1997
1998
1999
YEAR
Source: Statistics Canada


1999 EXPORTS OF LENTILS
Million Dollars
GERMANY $1.67
FRANCE $0.83
GREECE $0.73
BELGIUM $0.62
TURKEY $1.86
ISRAEL $0.38
ITALY $1.86
LEBANON $0.35
SPAIN $1.58
U.S.A. $0.96
MOROCCO $1.11
ALGERIA $1.16
T. TOBAGO $0.63
MEXICO $1.53
VENEZUELA $1.48
EGYPT $0.83
INDIA $1.03
COLOMBIA $2.88
BRAZIL $0.81
ECUADOR $0.32
TOTAL EXPORTS $24.99
(Top 20 of 47 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF LENTILS
Million Dollars
TURKEY $0.000
U.S.A. $0.13
TOTAL IMPORTS $0.13
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

MUSTARD SEED SECTOR

MUSTARD SEED SECTOR PROFILE

Production:

Mustard seed production began in Manitoba in 1952 with 1,300 acres planted. The dry conditions of the Prairies are well suited to mustard seed production and much of the world's crop comes from Western Canada, particularly Saskatchewan. Although Manitoba grows only 1-2 percent of the Canadian mustard seed crop, mustard seed is a good alternative cash crop to traditional grains and oilseeds.

In 1999, there were 7,000 acres of mustard seeded and 5,000 acres harvested in the province, down from the ten-year average of 12,330 acres. About 85 percent of Manitoba's plantings were yellow mustard with about 14 percent brown and the rest Oriental mustard varieties.

Mustard seed yields were highest at 1,214 pounds per acre in 1991. Yields, averaging 820 pounds per acre in 1999, were 8 percent above the 1998 yield, but were below the 10-year average of 919 pounds per acre. Harvested area and production peaked in 1968 with 65,000 acres and 55 million pounds respectively. The 1999 mustard crop of 4.1 million pounds was 46 percent smaller than the 1998 crop of 7.6 million pounds. Average mustard seed prices have ranged between $0.10 and $0.182 per pound over the past twenty years. The average price decreased from the 1996 record high to $0.137 per pound for the 1999 crop. The 1999 crop was valued at $560,000, less than half the 1998 crop value of $1,240,000.

Marketing:

Annual cash receipts for the sector decreased from $2.2 million in 1997 to $0.76 million in 1999, while Manitoba's contribution to Canadian mustard seed receipts fell from 2.3 percent in 1997 to 0.9 percent in 1999.

Mustard seed is delivered by producers to cleaning plants, such as Northern Sales, which separate and clean the seed to the specifications required by processors. The cleaned seed is shipped in bags or bulk by truck or rail to mustard mills in Hamilton and Montreal in Eastern Canada or to mills in states such as North Dakota and Missouri.

Manitoba markets yellow mustard (also known as white) for processing into American hot dog mustard, which uses the whole seed for a milder product and gets its yellow colour from turmeric. It is also used in processed meats for flavour and as a high-protein extender. The Oriental varieties can be pressed into oil used for cooking in some Asian countries. Brown mustard seed produces a hot mustard used in European products such as Dijon. The kernel of the seed is milled into flour for the hotter mustards. Most name brand, prepared mustards are a custom blend of yellow and Oriental mustard flour.

Processing:

Small amounts of mustard seed are processed in Manitoba. Organic, wild mustard seed is marketed by Crystal River Foods in Clearwater. Processors of prepared mustard in Manitoba include Elman's Food Products in Winnipeg.

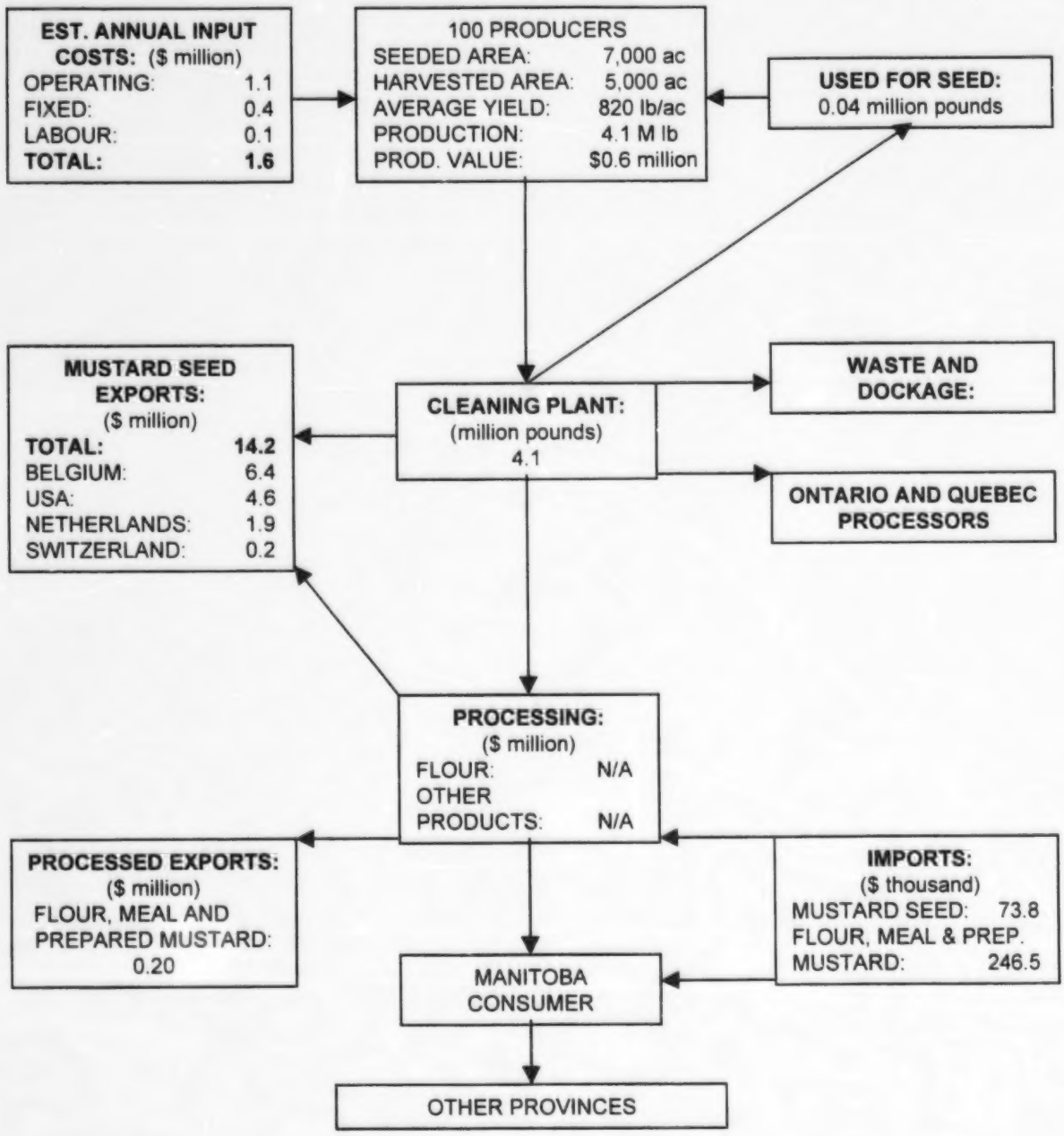
Trade:

Some of Manitoba's mustard seed is shipped to processors in Eastern Canada, but most of the mustard shipped out of the province in 1999 went to 19 countries such as the United States, Belgium, and The Netherlands. Exports were valued at $14.2 million in 1999. Mustard flour and prepared mustard, valued at $20,000, were exported to countries such as the U.S., France and Australia. Manitoba imported about $73,800 of mustard seed and $246,500 of mustard flour and prepared mustard in 1999, mostly from the U.S.

MUSTARD SEED SECTOR

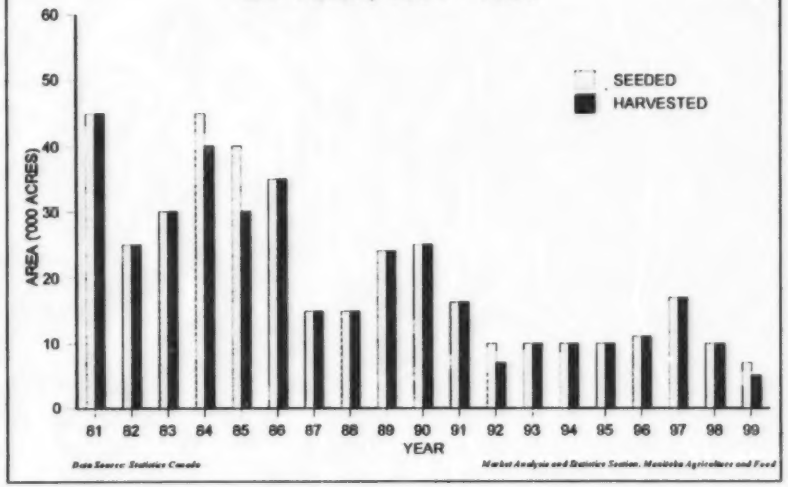
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	100	100	100	100	100
CROP PRODUCTION:					
Seeded Area ('000 acres):	11	17	10	7	70
% of Canada	1.9	2.4	1.4	1.0	
Harvested Area ('000 acres):	11	17	10	5	50
Yield/acre (pounds):	990	820	756	820	108
Production (million lb):	10.8	13.9	7.6	4.1	54
% of Canada	2.1	2.6	1.4	0.6	
Average Price ($/lb):	0.182	0.180	0.163	0.137	84
VALUE OF PRODUCTION ($ thousand):	1,970	2,510	1,240	560	45
ESTIMATED TOTAL EXPENSES ($/acre):	218.08	220.38	221.04	221.31	100
CASH RECEIPTS ($ million):	2.0	2.2	1.5	0.8	51
% of Canada	1.8	2.3	1.7	0.9	
EXPORTS ($ million):	26.7	18.0	13.7	14.4	105
Mustard Seed	26.4	17.8	13.5	14.2	105
Flour, Meal and Prepared Mustard	0.3	0.2	0.2	0.2	100
IMPORTS ($ thousand):	675.9	490.5	352.1	320.2	91
Mustard Seed	125.0	175.3	48.6	73.8	152
Flour, Meal and Prepared Mustard	550.9	315.2	303.6	246.5	81

MUSTARD SEED INDUSTRY CHART, 1999

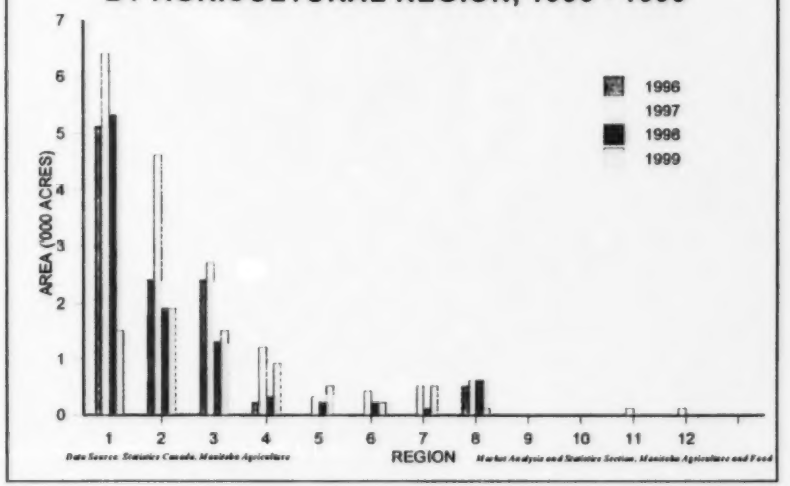


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

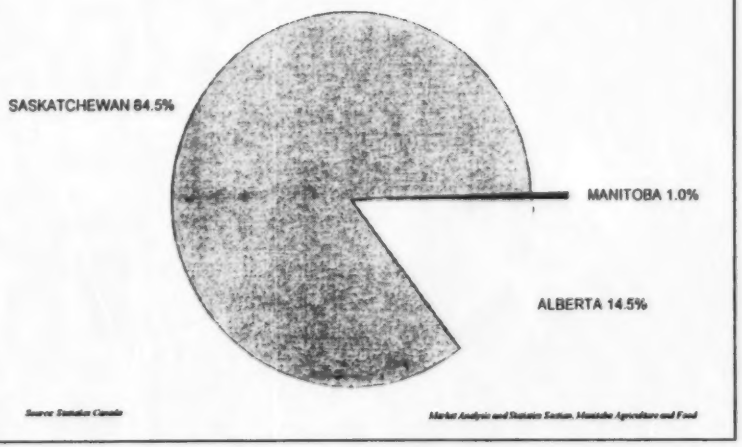
SEEDED & HARVESTED AREA OF MUSTARD SEED BY YEAR, 1981 - 1999



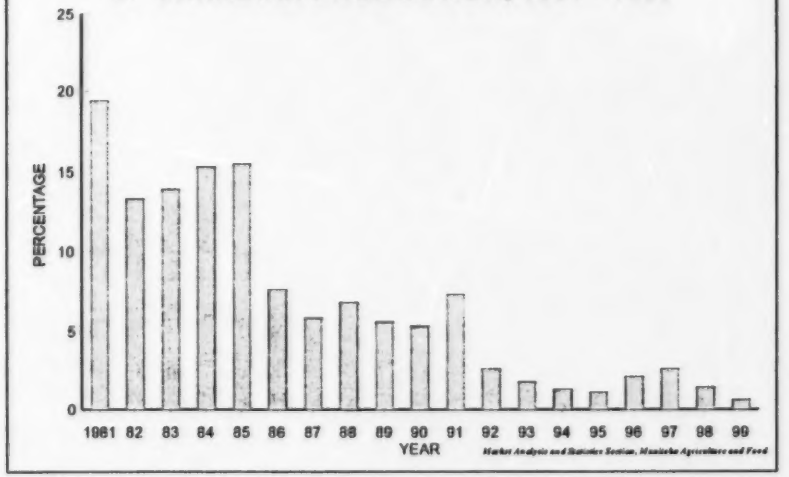
SEEDED AREA OF MUSTARD SEED BY AGRICULTURAL REGION, 1996 - 1999



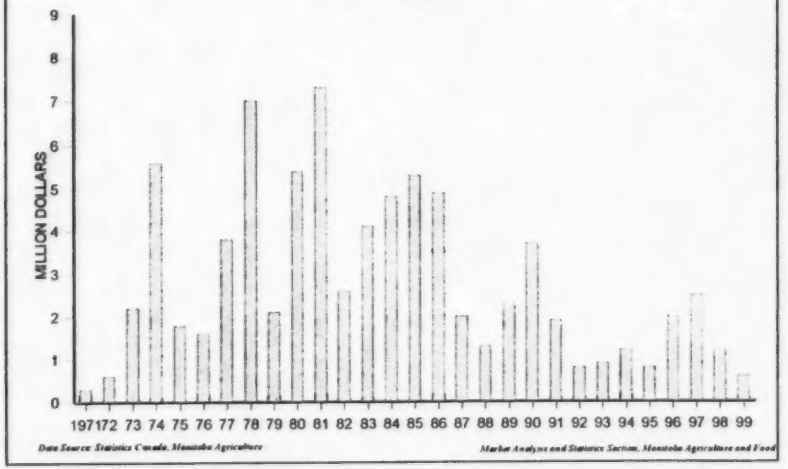
SEEDED AREA OF MUSTARD SEED BY PROVINCE, 1999



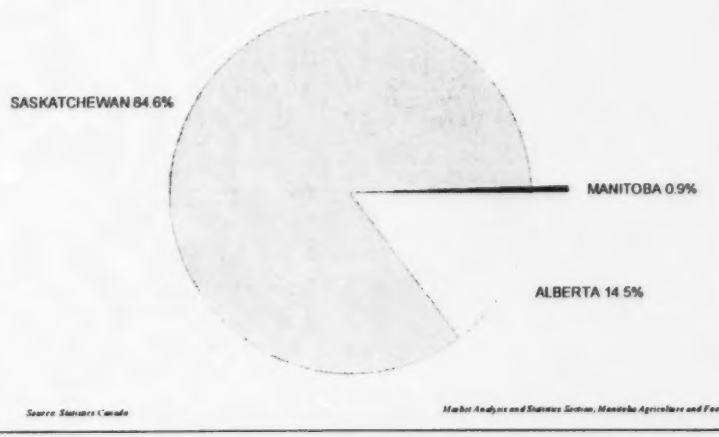
MUSTARD SEED PRODUCTION AS A PERCENT OF CANADIAN PRODUCTION, 1981 - 1999



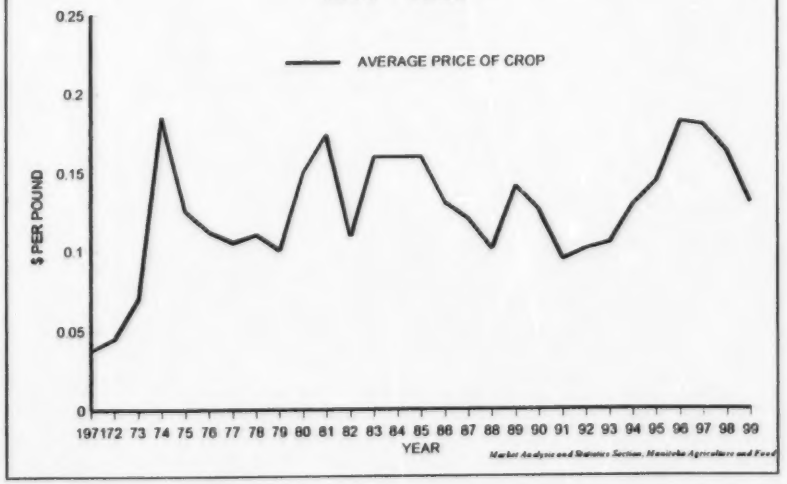
FARM VALUE OF MUSTARD SEED PRODUCTION 1971 - 1999


MILLION DOLLARS
0
1
2
3
4
5
6
7
8
9
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

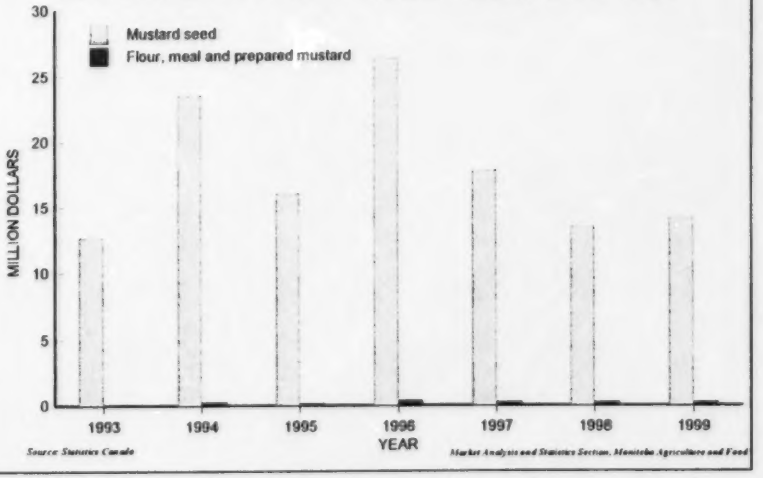
FARM CASH RECEIPTS FROM MUSTARD SEED BY PROVINCE, 1999

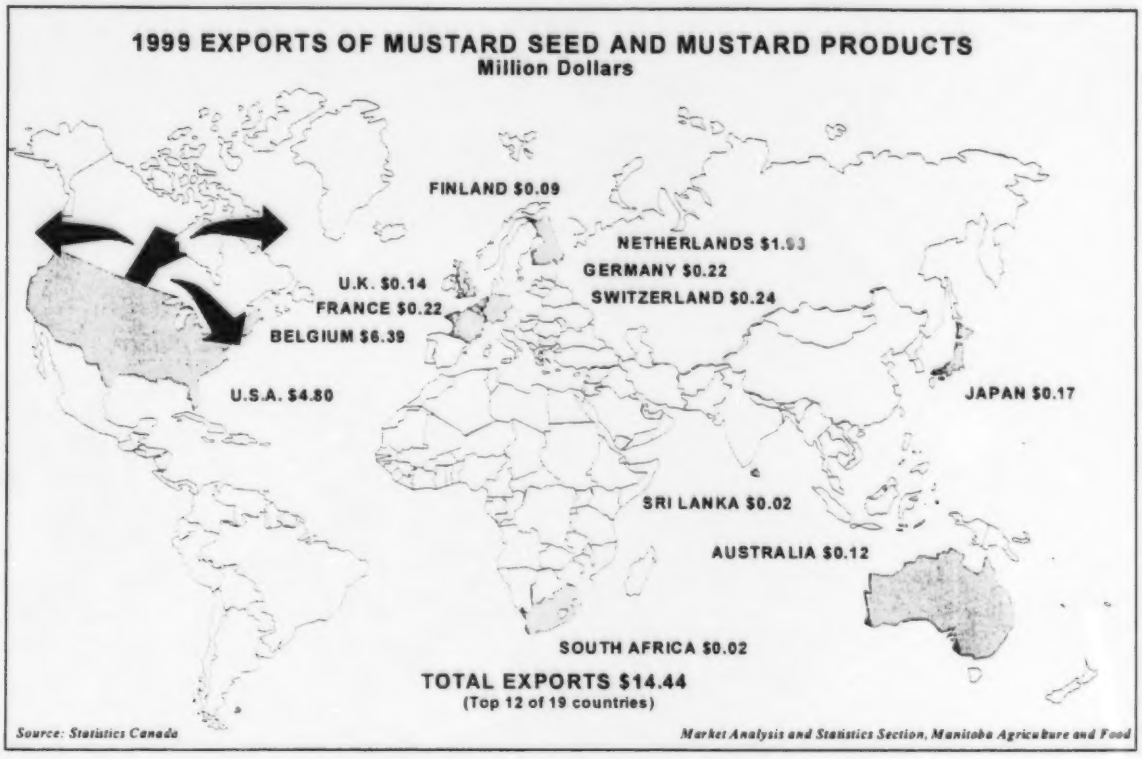


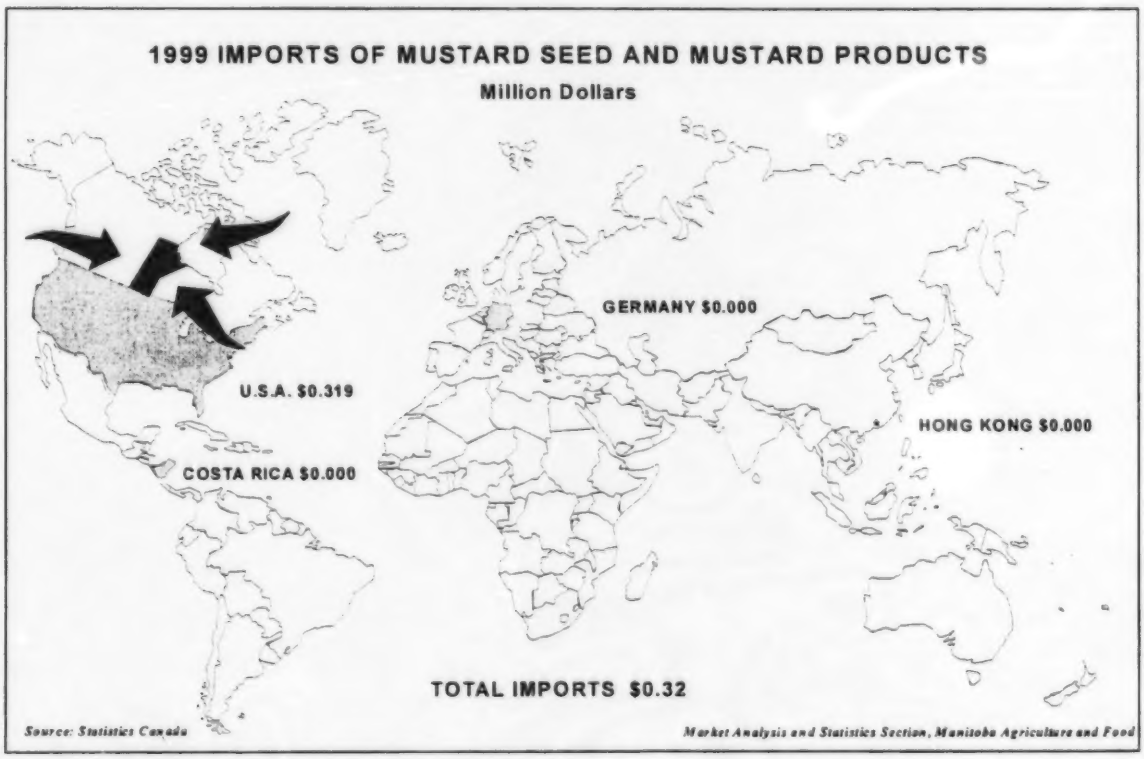
MUSTARD SEED PRICES 1971 - 1999


$ PER POUND
0
0.05
0.1
0.15
0.2
0.25
AVERAGE PRICE OF CROP
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

MANITOBA MUSTARD SEED AND PRODUCT EXPORTS TO OTHER COUNTRIES, 1993-1999




1999 EXPORTS OF MUSTARD SEED AND MUSTARD PRODUCTS
Million Dollars
FINLAND $0.09
NETHERLANDS $1.93
GERMANY $0.22
U.K. $0.14
SWITZERLAND $0.24
FRANCE $0.22
BELGIUM $6.39
U.S.A. $4.80
JAPAN $0.17
SRI LANKA $0.02
AUSTRALIA $0.12
SOUTH AFRICA $0.02
TOTAL EXPORTS $14.44
(Top 12 of 19 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF MUSTARD SEED AND MUSTARD PRODUCTS
Million Dollars
GERMANY $0.000
U.S.A. $0.319
HONG KONG $0.000
COSTA RICA $0.000
TOTAL IMPORTS $0.32
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FORAGE SECTOR

FORAGE SECTOR PROFILE

Production:

Tame Hay: Manitoba livestock producers have been using native hay and pasture since homesteading in the province began. The first recorded production of tame or cultivated hay was in 1908, when 215,000 tons of hay were produced from 119,000 acres. The crop was priced at $7.40 per ton for a total value of $1.6 million. As cattle numbers increased in the 1920s, so did the area of tame hay, which was slightly over 200,000 acres until 1927 when the area doubled. The area of tame hay increased to around one million acres in the 1960s rising to 1.9 million acres during 1992 to 1998 and 2.025 million in 1999. Adverse weather conditions in many areas of the province in 1997 reduced hay yields to an average of 0.85 tons per acre, but relatively good conditions in 1999 resulted in yields of 1.94 tons per acre. The ten-year average yield is 1.71 tons per acre. Hay production in 1999 was estimated at 3.75 million tons, an increase of 23 percent from the 1998 crop. A record average yield of 2.37 ton per acre was recorded in 1986, but tame hay production peaked in 1990 at 4 million tons.

About 75 percent of Manitoba's hay is used for beef production with about 25 percent comprised of various dairy-quality hays. Manitoba produced about 12.7 percent of the Canadian tame hay crop in 1999, up from 10.2 percent in 1997.

Average tame hay prices rose from $45 per ton for the 1994 crop to $59 per ton for the 1997 crop, but declined to $50 per ton in 1998 and 1999. Prices were highest at $63.50 per ton during the drought year 1980. The total value of the Manitoba tame hay crop was highest in 1993, at $192.8 million, making it the third most valuable crop in the province that year after wheat and canola. In 1997, the hay value of $94.4 million was the lowest level since 1975, but the value increased to $187.1 million in 1999, once again making hay the third most valuable crop in Manitoba.

Estimated operating expenses for tame hay production rose from $80.25 per acre in 1997 to $80.83 per acre in 1999.

Forage Seeds: The first record of commercial forage seed production in Manitoba was in 1936 when the crop was valued at $108,000. The interest in forage seed production grew and by 1979 the crop was valued at over $8 million. Crop area, production and prices varied over the next fifteen years. The crop value went from $14.1 million in 1987 down to a low of $2.4 million in 1993. In 1999, 20.4 million pounds of forage seed, valued at a record $17.9 million, were marketed from an area of 100,900 acres. Alfalfa seed sales (pollinated by alfalfa leaf-cutting bees) were valued at $8.8 million in 1999, followed by Timothy seed at $3.0 million and Birdsfoot Trefoil at $2.0 million. Smaller amounts of annual Rye Grass, Bromegrass, Creeping Bentgrass, Crested Wheatgrass, Kentucky Bluegrass, Meadow Fescue, Reed Canary Grass, Red Clover and Sweet Clover seed are also grown in Manitoba. Manitoba produces about 30-40 percent of the forage seed marketed by Manitoba companies.

Pasture: In 1996, there were 4,086,700 acres of unimproved, native pasture and hayland in the province, down from 4,326,000 acres in 1991. Improved pastureland increased from 843,000 acres in 1991 to 880,300 acres in 1996.

Marketing:

Most of the Manitoba tame hay crop is used for beef and dairy cattle production in the province with small amounts being used for other ruminant species, such as sheep, goats, deer and bison. Only a small portion of the crop is sold out of the province as hay. Some excellent dairy-quality alfalfa and alfalfa-mix hay is exported to the U.S.

Hay is sold from farm to farm, from surplus areas of the province to deficit areas. A hay listing service is provided by Manitoba Agriculture and Food.

Some of Manitoba's alfalfa and Timothy hay is sold to pelleting and compacting plants.

Annual farm cash receipts from the sector reflect only recorded exports of the hay crop, which generally are under-reported. Cash receipts from hay only were estimated at $16.0 million in 1999, up from $12.3 million in 1998. Cash receipts from forage seed sales have been revised to better reflect Manitoba-origin forage seed exports. Receipts increased from $14.9 million in 1997 to $19.1 million in 1999. Manitoba's contribution to Canadian forage seed receipts rose from 19.2 percent in 1997 to 23.6 percent in 1999.

Processing:

There are two main processors of alfalfa into pellets and meal, Alfalfa Products Ltd. in Fort Whyte (Winnipeg) and Coldstream Alfalfa Processing, Ltd. in Dauphin. Central Plains Processors in Portage la Prairie does some alfalfa compacting and several other compacting plants were operational in 1999, including Sunridge Forage Ltd. in Russell, Lake Manitoba Forage in Gladstone and Canadian Greenfield Forage in Teulon. These plants also compact Timothy hay, mainly for the Japanese market.

Trade:

Exports of hay to the United States are comprised mainly of high-quality alfalfa and alfalfa-mix bales for the dairy industry. The dairy states in the United States have been reducing their hay area in recent years, which provides an opportunity for Manitoba exporters of high-quality hay. Small quantities of compressed hay were sold to Japan and the United Kingdom in 1999. Total 1999 hay exports amounted to $3.2 million, half the 1997 value.

Exports of alfalfa pellets and meal to the United States totalled only $0.03 million in 1999, down significantly from $2.2 million in 1996 and $4.7 million in 1992.

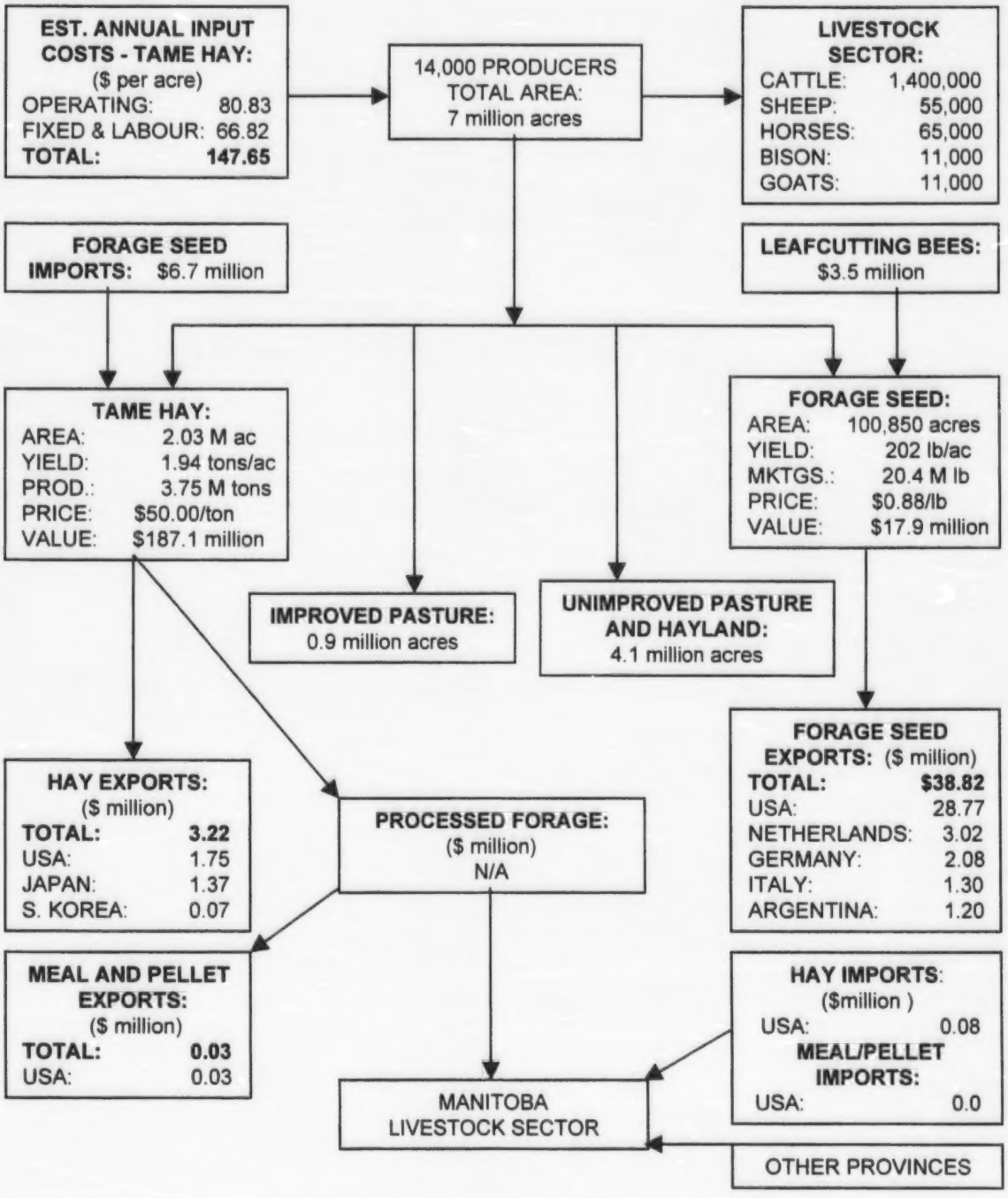
Forage seed export data for Manitoba include seed from other western provinces and small amounts of imported seed. Forage seed exports increased from $17.4 million in 1993 to $40.7 million in 1998, but declined to $38.8 million in 1999. Of 19 countries which purchased forage seeds from Manitoba-based companies in 1999, the United States was Manitoba's most important customer, buying $28.8 million or 74 percent.

Twelve countries supplied Manitoba companies with forage seeds valued at $6.7 million in 1999, the largest supplier being the United States. This was a 49 percent increase from 1998. Small quantities of hay were also imported from the U.S. in 1999.

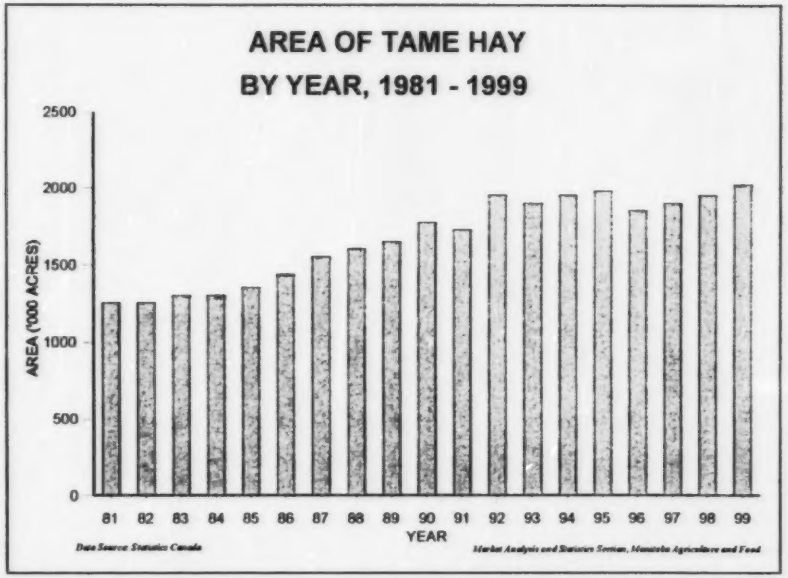
FORAGE SECTOR

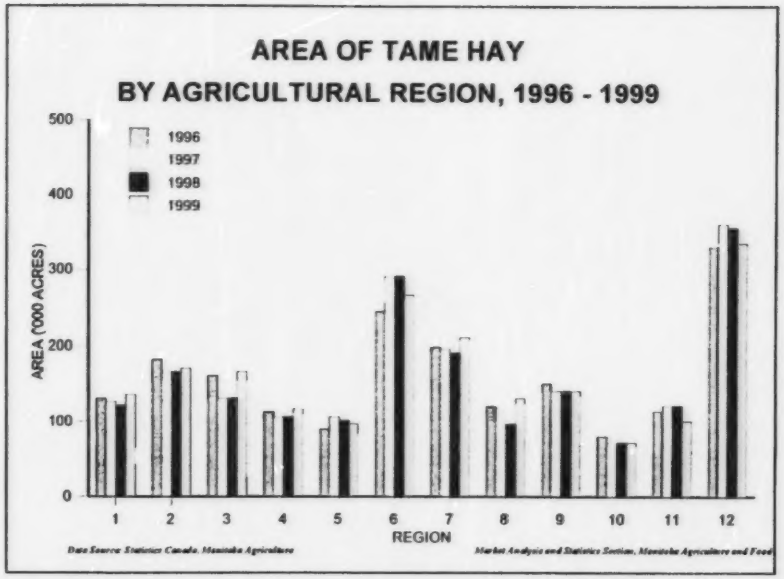
	1996	1997	1998	1999[P]	'99 as a % of '98
Number of Farms with Hay/Forage	14,000	14,000	14,000	14,000	100
TAME HAY PRODUCTION:					
Seeded Area ('000 acres):	1,852	1,900	1,950	2,025	104
% of Canada	11.7	12.1	12.2	12.1	
Harvested Area ('000 acres):	1,852	1,900	1,880	1,930	103
Yield (tons/acre):	1.70	0.85	1.62	1.94	120
Production ('000 tons):	3,180	1,600	3,050	3,750	123
% of Canada	10.5	10.2	12.9	12.7	
Average Price ($/ton):	50.00	59.00	50.00	50.00	100
VALUE OF PRODUCTION ($ million):	154.7	94.4	152.4	187.1	123
EST. OPERATING EXPENSES ($/acre):	80.23	80.25	80.49	80.83	100
CASH RECEIPTS ($ million):	4.8	11.7	12.3	16.0	130
% of Canada	3.5	7.3	8.0	9.7	
FORAGE SEED PRODUCTION:					
Harvested Area ('000 acres):	62.0	64.0	70.0	100.9	144
Yield (lb/acre):	247	261	230	202	88
Marketings ('000 lb):	15,305	16,707	15,600	20,360	131
Average Price ($/lb):	0.88	0.89	1.13	0.88	78
VALUE OF PRODUCTION ($ million):	13.5	14.9	17.7	17.9	101
CASH RECEIPTS ($ million):	13.5	14.9	17.7	19.1	108
% of Canada	20.2	19.2	21.4	23.6	
IMPROVED PASTURE ('000 acres):	880.3	N/A	N/A	N/A	
UNIMPROVED PASTURE ('000 acres):	4,086.7	N/A	N/A	N/A	
EXPORTS ($ million):	33.2	42.8	44.3	42.1	95
Hay	3.3	6.3	3.1	3.2	103
Alfalfa Pellets and Meal	2.2	0.4	0.5	0.03	6
Forage Seeds	27.7	36.0	40.7	38.8	95
IMPORTS ($ million):	1.66	3.0	4.6	6.8	148
Hay	0.02	0.1	0.05	0.08	160
Alfalfa Pellets and Meal	0.001	0.0	0.0	0.0	
Forage Seeds	1.64	2.9	4.5	6.7	149

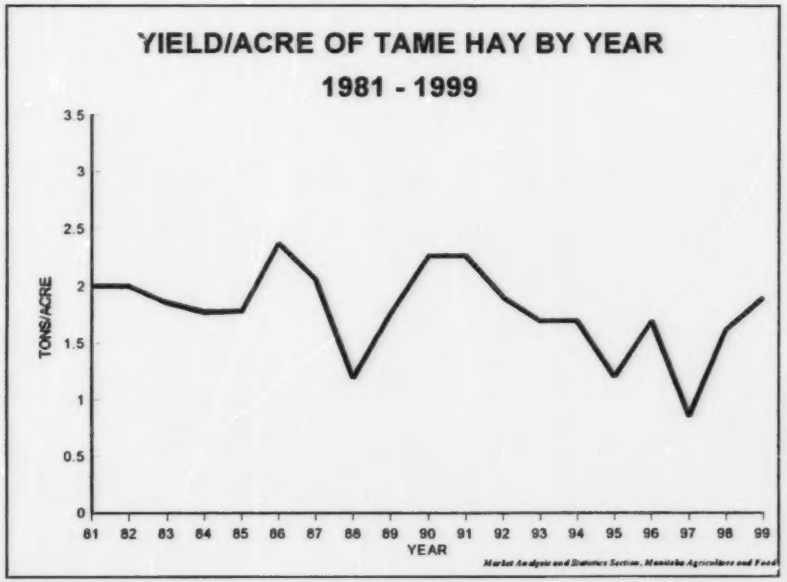
FORAGE INDUSTRY CHART, 1999

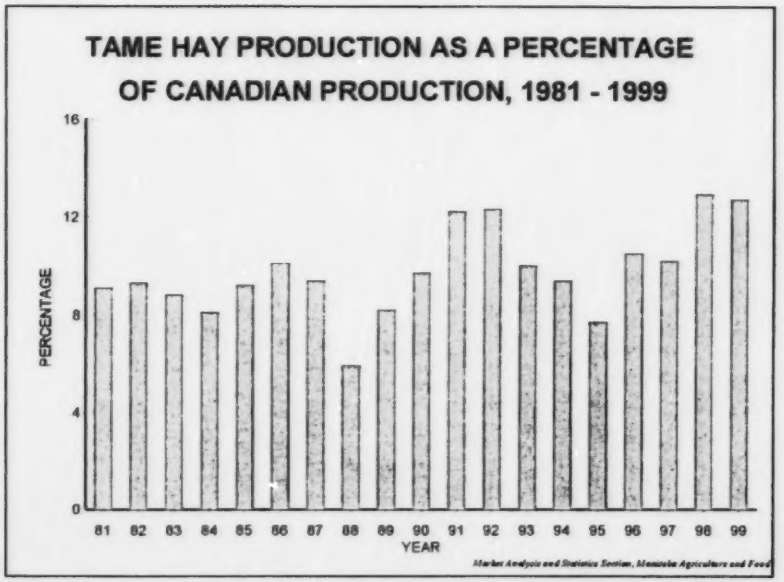


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

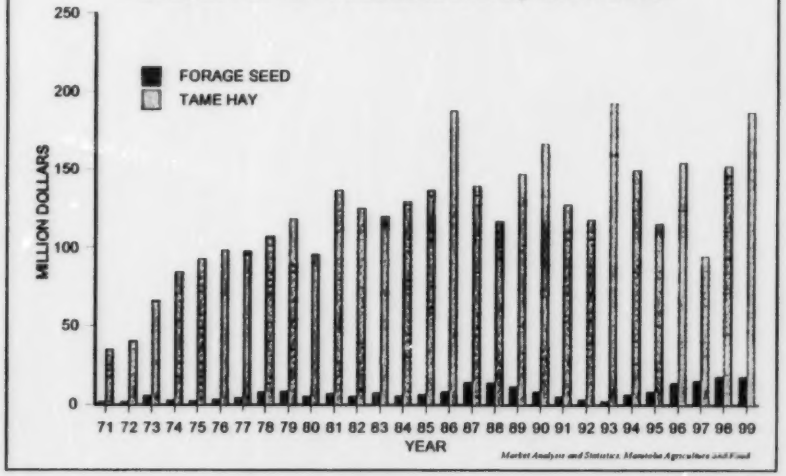

AREA OF TAME HAY
BY YEAR, 1981 - 1999
AREA ('000 ACRES)
2500
2000
1500
1000
500
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


AREA OF TAME HAY
BY AGRICULTURAL REGION, 1996 - 1999
1996
1997
1998
1999
AREA ('000 ACRES)
500
400
300
200
100
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

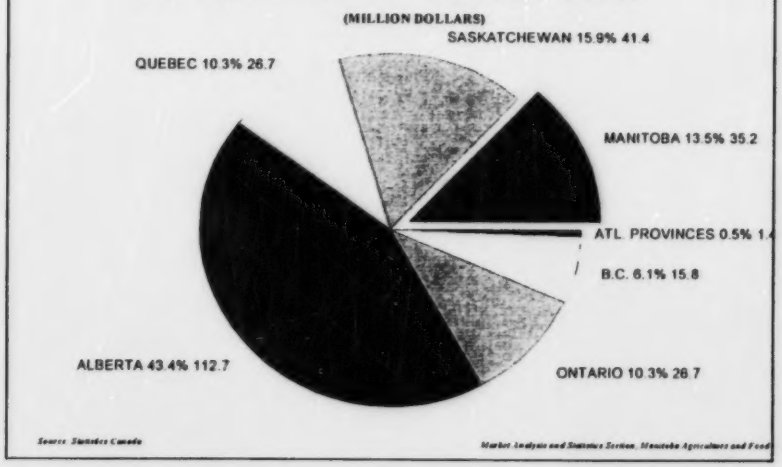

YIELD/ACRE OF TAME HAY BY YEAR
1981 - 1999
TONS/ACRE
3.5
3
2.5
2
1.5
1
0.5
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food


TAME HAY PRODUCTION AS A PERCENTAGE
OF CANADIAN PRODUCTION, 1981 - 1999
PERCENTAGE
16
12
8
4
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

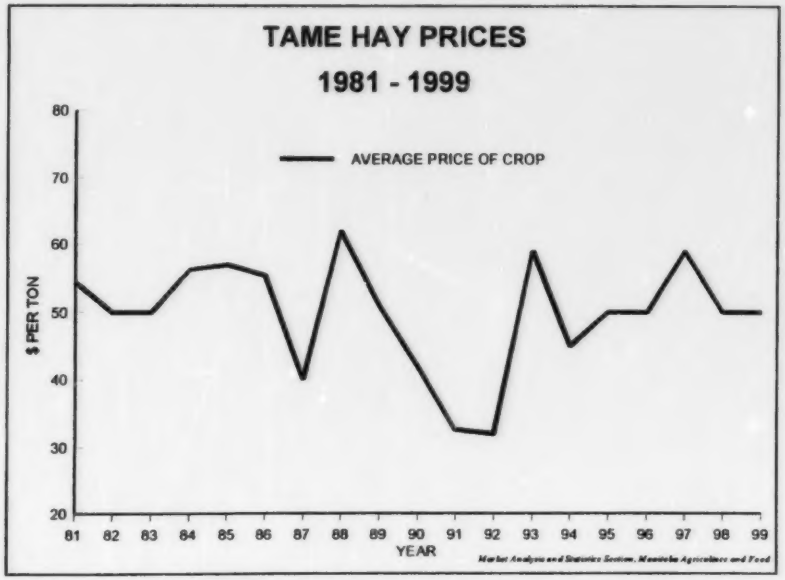
FARM VALUE OF TAME HAY AND FORAGE SEED PRODUCTION, 1971-1999



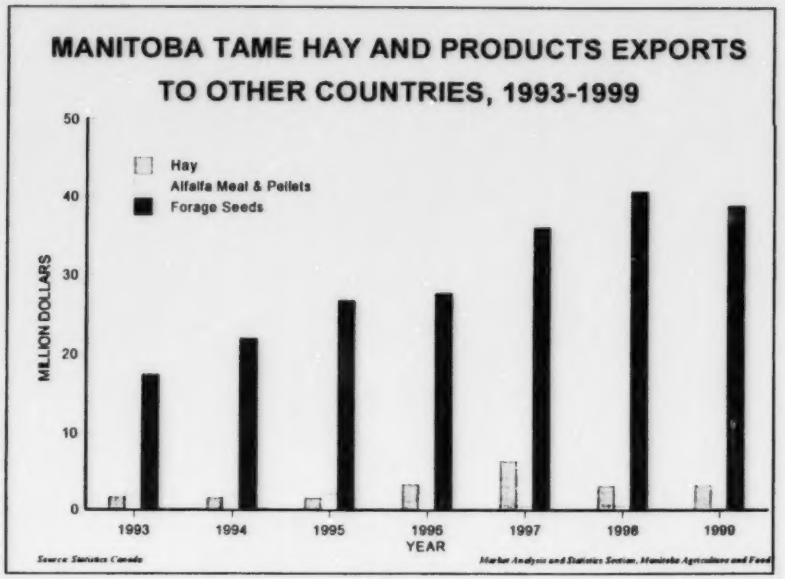
FARM CASH RECEIPTS FROM TAME HAY AND FORAGE SEED BY PROVINCE, 1999

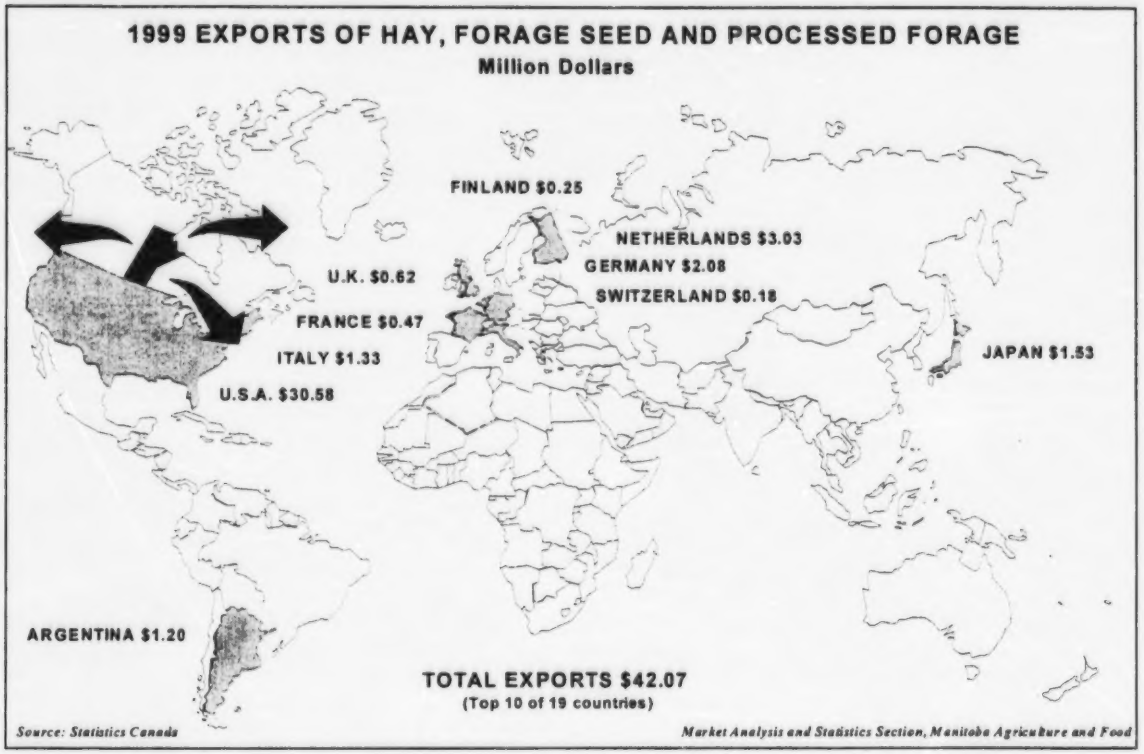


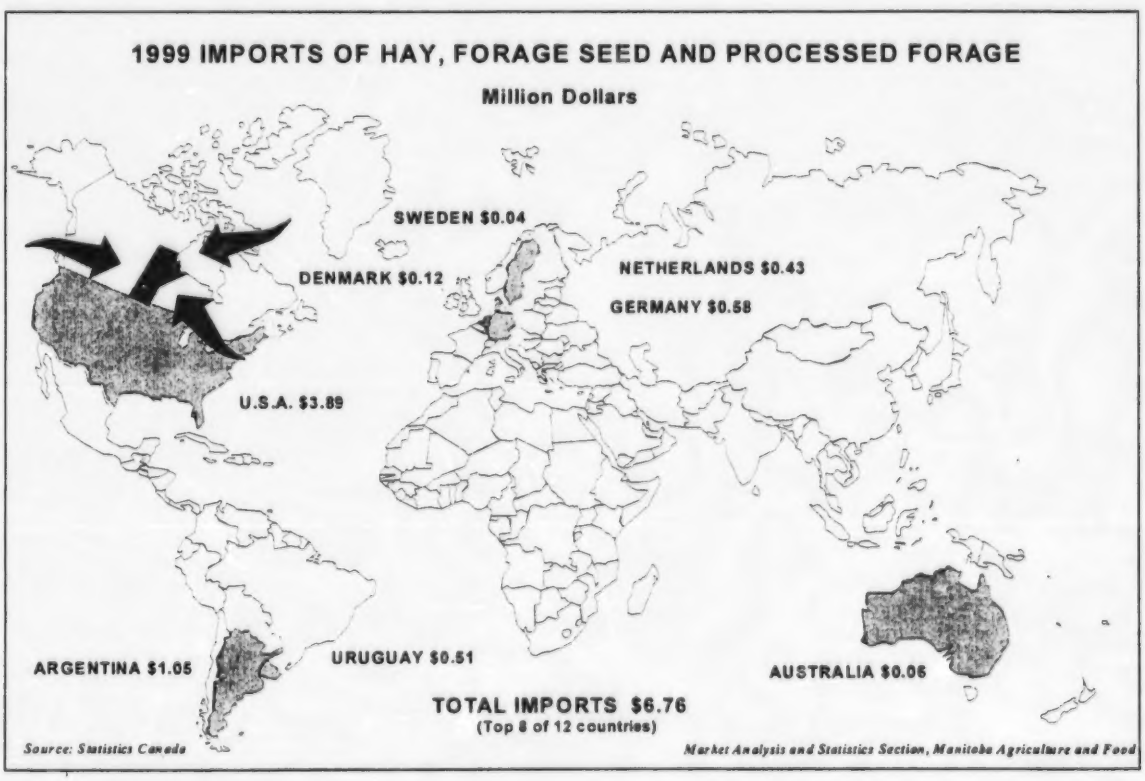
TAME HAY PRICES 1981 - 1999



MANITOBA TAME HAY AND PRODUCTS EXPORTS TO OTHER COUNTRIES, 1993-1999




1999 EXPORTS OF HAY, FORAGE SEED AND PROCESSED FORAGE
Million Dollars
FINLAND $0.25
NETHERLANDS $3.03
GERMANY $2.08
SWITZERLAND $0.18
U.K. $0.62
FRANCE $0.47
ITALY $1.33
U.S.A. $30.58
JAPAN $1.53
ARGENTINA $1.20
TOTAL EXPORTS $42.07
(Top 10 of 19 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF HAY, FORAGE SEED AND PROCESSED FORAGE
Million Dollars
SWEDEN $0.04
DENMARK $0.12
NETHERLANDS $0.43
GERMANY $0.58
U.S.A. $3.89
ARGENTINA $1.05
URUGUAY $0.51
AUSTRALIA $0.06
TOTAL IMPORTS $6.76
(Top 8 of 12 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food